

# TEX LINX

## Instruction Guide



Updated: March 2016





**TexLinX** system updates in this edition of the **TexLinX Instruction Guide**:

1. **TexLinX** branding has replaced the Infolinx logo.
2. **Drive Date** is now required on all applicable tabs.
3. The fields on the **Boxes** tab and the **Microforms** tab have been rearranged to reflect conformity.
4. **Data Sheet** is now available on the **Files** tab.
5. **Box Types** field has been updated in the **Disaster Recovery** tab.
6. **Return Type** field in **Disaster Recovery** has been modified to a single selection: **Will Call**.
7. **Specific Return Date** field has been removed from **Disaster Recovery**. All returns are now scheduled thru **Will Call**.
8. **Film Type** and **Film Size** have some added options in the **Microforms** tab, but these options are selected only by the Imaging Staff at the State Records Center in conjunction with information provided for an Imaging Production work order.
9. **Beginning File | Ending File Range** field label on the **Boxes** tab and on the **Microforms** tab now includes the Pipe symbol (instead of a forward slash or a hyphen) to help reduce confusion.
10. **NEW ACCESSION** is required to be entered into the Comments field on the Request Items to be Picked Up screen when sending items to the State Records Center for the first time.
11. **Fiche Circulation** tab has been added for users to make delivery and pickup requests in TexLinX for individual microfiche jackets. The procedures are explained in the sections **Request Pickup: Returning Microfiche Partial Bundles to the SRC** and **Request Delivery: From the State Records Center: Microfiche Jackets**.
12. Explanation for what happens when something is assigned as **Waitlist** when completing a Request Delivery.
13. New **Appendix** sections in this guide:
  - Cancel a Request (Pickup or Delivery)**
  - Dashboard**
  - Change Your Password**
  - Timer**
  - Export**



# TexLinx Instruction Guide

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# Introduction to TexLinx

## What is TexLinx?

TexLinx is a secure, cloud-based records management software package designed in a collaborative effort between the Texas State Library's State & Local Records Management division and Baltimore, Maryland-based Infolinx. Depending upon the permissions assigned by each agency's Records Management Officer or Records Management Liaison, agency users can:

- View the agency's storage inventory at the State Records Center.
- Request pickups and deliveries between the agency and the State Records Center.
- Create imaging jobs with the State Records Center's Imaging Department.
- View the agency's Records Retention Schedule (only the RMO and/or RML can edit it).
- Register for training classes.
- Generate disposition requests (only the RMO and/or RML can do this).

## Why TexLinx?

The springboard for TexLinx was an audit conclusion several years ago that reported the clients of the State Records Center would be better served by providing an online system where agency users could view their agency's State Records Center inventory of records. Over the years, that recommendation grew to include more than just an inventory of records to include all aspects of the State & Local Records Management division. The system is streamlined to incorporate all facets of the State & Local Records Management division.

## Don't get placed in Time Out, be sure to Logout!

When you log in to TexLinx, you create a spot for yourself in the system. The system has a limited number of spots available so, as long as you are active in the system, you keep your spot. But if you are inactive for more than 10 or 15 minutes without logging out, the system will time out your session...but it has not freed your spot for another user. And it will be that way for 24 hours. The only way to avoid time out is to logout each time you are finished working in TexLinx. It is a courtesy to other users who need to be in the system.

## What is this manual?

This is a comprehensive guide designed so that sections stand on their own. Please do not be intimidated by the number of pages. Each section gives you step-by-step instructions, often with illustrations, for a particular process. So, please refer to the Table of Contents to find the task you want to accomplish and go to that section in the guide and follow the instructions. Anytime you hit a speed bump or appear to be stuck, the contact information on the following page is a great resource to get your questions answered.

## And...TEX SAYS?



Hi, there! My name's Tex and I'm hanging out in the cloud with TexLinx. People often say, "Tex says a lot." I suppose that is true. I do have a lot to say; but like wise old timers, when I say something, it is usually important. So, listen up, partner! When you see **TEX SAYS** that is just little ol' me adding a bit more detail to the instruction.

## Introduction

### Help! Who do I call for assistance?

This TexLinX Instruction Guide is designed to assist you with most of the processes you will use. However, if there comes a time when you need assistance, we are here to help. These are the people, the phone numbers, and the email addresses for the employees in the State & Local Records Management division (at the State Records Center on Shoal Creek Boulevard and downtown at the Lorenzo De Zavala Building) who can answer your TexLinX questions:

### State Records Center (storage, deliveries, pickups, destruction, imaging)

#### RECORDS CENTER TEXLINX QUESTIONS:

**Michael Shea**, SRC Manager, 512-475-5151, michael.shea@tsl.texas.gov

**Dee Riley**, SRC Assistant Manager, 512-475-5152, dee.riley@tsl.texas.gov

**Bobby French**, Customer & System Specialist, 512-475-5167, bobby.french@tsl.texas.gov

**Zachary Bruton**, Records Circulation Team Lead, 512-475-5155, zachary.bruton@tsl.texas.gov

#### DESTRUCTION:

**Michael Shea**, SRC Manager, 512-475-5151, michael.shea@tsl.texas.gov

#### IMAGING (microfilm, microfiche, digital imaging):

**Pete Cortez**, Lead Worker, 512-475-5162, pete.cortez@tsl.texas.gov

### Records Management Assistance (Retention schedules, training classes)

**Sarah Jacobson**, RMA Manager, 512-463-5449, sarah.jacobson@tsl.texas.gov

**Erica Wilson**, Government Information Analyst, 512-463-6627, erica.wilson@tsl.texas.gov

### Password Assistance

**Scott McDonald**, Data Center Specialist, 512-475-5166, scott.mcdonald@tsl.texas.gov

### Director, State & Local Records Management division

**Craig Kelso**, 512-463-7610, craig.kelso@tsl.texas.gov

## About the TexLinX Instruction Guide:

Care and attention have been used to ensure the TexLinX Instruction Guide is accurate and complete. If you find a printing error, please send an email to [texlinx@tsl.texas.gov](mailto:texlinx@tsl.texas.gov)

If there is something you would like to see added in a future edition of the TexLinX Instruction Guide, please let us know at [texlinx@tsl.texas.gov](mailto:texlinx@tsl.texas.gov)

# TexLinx Homepage

The screenshot shows the TexLinx homepage interface. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Text. Below this is a row of item type tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is active. A search section contains fields for Box Barcode, Organization Quick Description, Box Size, Agency Box #, Drive Date, and Eligible Destruction Date. Below these are fields for Create Date, Created By Description, Last Modified Date, Destruction Batch #, and Legacy Tracking #. A 'Quick Search' button is present. Below the search section is an 'Action Menus' bar with buttons for Activity, Search and View, Data Manipulation, Data Removal, and Cart. The main area is a 'Homepage Grid' table with columns: Box Barcode, Organization Quick Description, Box Size, Agency Box #, Inclusive Date Range, Beginning File | Ending File Range, Eligible Destruction Date, AIN, Record Series Title, Event Based, Years, Months, Destruction Batch #, and Current Location. The table contains multiple rows of data. On the left side of the grid, there are two checkboxes: 'Select All Items checkbox' and 'Box Select checkbox'. Numbered callouts 1 through 7 point to the following elements: 1. Navigation Menu, 2. Item Type Tabs, 3. Quick Search, 4. Action Menus, 5. Homepage Grid, 6. Select All Items checkbox, and 7. Box Select checkbox.

This is a sample of how the Boxes screen appears for Johnny Agency who is a Records Center User (RCU) in TexLinx for the Texas Big State Agency. The formatting of the screen is similar in the other Item Type Tabs for Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Record Series.

1. **Navigation Menu:** These links are always available throughout the application. They can be used to quickly jump to a particular section of TexLinx.
2. **Item Type Tabs:** These are the types of items available to you in TexLinx. A white tab is the current active tab. Orange tabs are the current inactive tabs.
3. **Quick Search:** Input search fields for TexLinx. Quick Search fields vary depending upon the Item Type Tab.
4. **Action Menus:** Actions that can be performed on items matching search criteria.
5. **Homepage Grid:** Records matching a given search.

## Checkboxes

6. **Select All Items** on this page of the grid, click the checkbox on the left of the orange ribbon.
7. **Box Select**, click the checkbox to the left of each item to select individual boxes.

## Navigation Menu



1. **Home:** Always returns you to the last Item Type Tab's homepage grid.
2. **Preferences:** Used to set preferences for each individual.
3. **Reports:** Go here to generate specific reports that your Role permissions allow you to view.
4. **Requests:** See pickup and delivery requests you have submitted but have not been processed thru the State Records Center (SRC).
5. **Admin:** This area is regulated by the Role permissions assigned to you in TexLinx.
6. **Dashboard:** See items in your possession, pending requests you've made, and your preferences
7. **Help:** This is a quick tour of each page.
8. **Print:** Prints what is seen on the page, not all of what is contained on the pages of a grid.
9. **TexLinx Resources:** Reference materials designed to assist you with TexLinx.
10. **Timer:** The amount of time left before this session ends. To reset the timer, click a Save option, click a radio button, or move to another TexLinx tab. The timer starts at 20 minutes. End-of-session pop-up warnings are posted when time remaining is 3 minutes, 2 minutes, and 1 minute.
11. **Logout:** Always click Logout when you are finished working in TexLinx. If you do not Logout, you might get an error message the next time you log into TexLinx.

## Item Type Tabs



Depending upon the Role permissions assigned, you might see more or less than the number of tabs that appear here. The active tab appears as white, the inactive tabs appear as orange.

**Boxes:** Create and edit boxes, request pickup, and request delivery.

**Files:** Create and edit files and place them in boxes, request pickup, and request delivery.

**Disaster Recovery:** Create and edit Disaster Recovery items, request pickup, and request delivery.

**Microforms:** Microforms is the combined tab for Microfilm and Microfiche. Create and edit microforms, request pickup, and request delivery.

**Fiche Circulation:** Request delivery and/or request pickup for individual Microfiche Jackets.

**Imaging Production:** Create a work order for the Imaging Department at the State Records Center.

**Records Series:** Until your agency's full Retention Schedule is uploaded, only those Records Series Titles with storage at the State Records Center when TexLinx launched and those added thereafter appear under this tab.

## TexLinx Homepage

# Quick Search

<b>Box Barcode</b> <input style="width: 90%;" type="text"/>	<b>Agency Name</b> <input style="width: 90%;" type="text"/>	<b>Division Name</b> <input style="width: 90%;" type="text"/>	<b>Box Size</b> <input style="width: 90%;" type="text"/>
<b>Agency Box #</b> <input style="width: 90%;" type="text"/>	<b>Eligible Destruction Date</b> <input style="width: 90%;" type="text"/>	<b>Destruction Batch #</b> <input style="width: 90%;" type="text"/>	
<input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">(Rollover for Current Search)</a>			

The fields for Quick Search vary from tab to tab. Enter search information using data and symbols to find the items you need. Please see Search in the Appendix for information on how to use keyboard shortcuts.

**Search:** Click this after you complete one or more of the Quick Search fields.

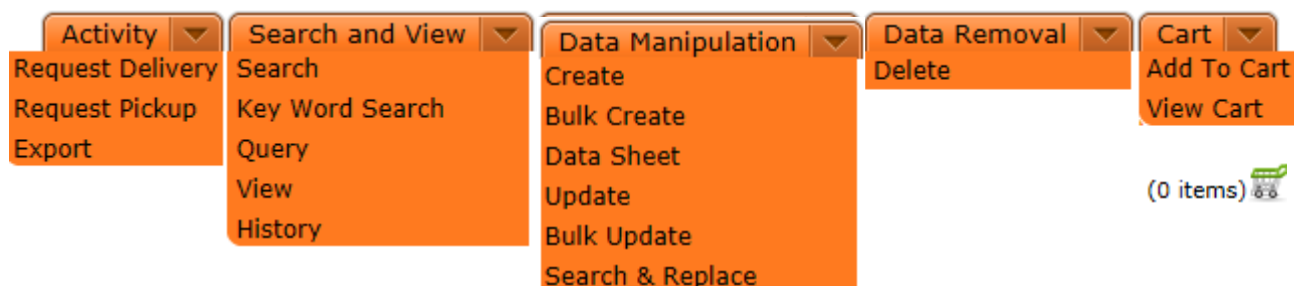
**Clear:** Clicking this clears all Quick Search fields as well as the results in the homepage grid.

**(Rollover for Current Search):** Hover your mouse over this to tell you the search criteria you entered into the Quick Search fields.

Shortcuts you can use in the Quick Search fields:

Shortcut	Definition	Data Entered	Result
=	Exact	=500	Items with 500
>	Greater Than	>500	Items greater than 500
<	Less Than	<500	Items less than 500
>=	Greater Than or Equal To	>=500	Items equal to and greater than 500
<=	Less Than Or Equal To	<=500	Items equal to and less than 500
><	Greater Than And Less Than	>500<700	Items greater than 500 and less than 700
IsNotNull	Field With Data	IsNotNull	Items with data in that field
IsNull	Field With No Data	IsNull	Items with no data in that field

## Action Menus



To activate any of these menus, select an item or items from the homepage grid, click on the menu title, and a dropdown menu appears. This is tab specific so all work using any of these menus is for one tab only.

### ACTIVITY

***Request Delivery:*** Request delivery from the State Records Center.

***Request Pickup:*** Request pickup from your agency.

***Export:*** Export items from TexLinx to your computer.

### SEARCH AND VIEW

***Search:*** The screen is a page of searchable fields.

***Key Word Search:*** Use a combination of a specific field and a key word found in that field.

***Query:*** Use equations to generate a search.

***View:*** View a specific item.

***History:*** View the history of an item.

### DATA MANIPULATION

***Create:*** Create a new item.

***Bulk Create:*** Create multiple items with identical but editable information.

***Data Sheet:*** Appears only on Boxes, Files, and Microforms tabs. Create multiple items in a spreadsheet format for a single Organization and a single Record Series Title.

***Update:*** Revise current items in TexLinx.

***Bulk Update:*** Revise a collection of items in TexLinx with the same revised information.

***Search & Replace:*** Search for a specific term and replace that term with another specific term.


### DATA REMOVAL

***Delete:*** Delete an item from view and remove it from the active TexLinx inventory.

### CART

***Add To Cart:*** Move selected items to the cart for your future use in the current tab

***View Cart:*** View the items you have moved to your cart for the current tab

**TEX SAYS** Clicking  (0 items) is another way to view items in your cart. It is also an accumulated total for the items you have added to your cart for the current tab. The Cart is tab specific; items you place in the cart for one tab do not appear in The Cart for another tab.

# TexLinx Homepage

## Homepage Grid

Page 1 [ 2 ] [ 3 ] **1** [ 5 ] | Jump to Page:  Go The search found 84 Boxes

<input type="checkbox"/>	Box Barcode	Agency Name	Division Name	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input type="checkbox"/>	0000774345	Texas Big State Agency - 988	North	RC	1	1/1/2003-12/31/2015	a z	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/>	0000774346	Texas Big State Agency - 988	Central	RC	24	1/1/2003-12/31/2015	0001 0085	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/>	0000774348	Texas Big State Agency - 988	West	RC	45	01/01/2003-12/31/2014	01 68	06/30/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency
<input type="checkbox"/>	0000774349	Texas Big State Agency - 988	East	RC	a153	1/1/2004-12/31/2007	68a 99	08/31/2017	6	Employee Earnings Records	AC	10			Johnny Agency
<input type="checkbox"/>	0000774350	Texas Big State Agency - 988	East	RP-36	60	1/1/2004-12/31/2005	ac001 zy026	08/31/2016	6	Employee Earnings Records	AC	10			Johnny Agency
<input type="checkbox"/>	0000774351	Texas Big State Agency - 988	East	RC	10	1/1/2009-12/31/2010	days months	12/31/2020	6	Employee Earnings Records	AC	10			Jane Division
<input type="checkbox"/>	0000774352	Texas Big State Agency - 988	East	RC	77	1/1/2015-12/31/2015	Issue 2015-01.23   Issue 2015-01.29	12/31/2025	6	Employee Earnings Records	AC	10			Johnny Agency
<input type="checkbox"/>	0000774353	Texas Big State Agency - 988		RC	1009	04/01/2009-08/30/2013	water air	08/31/2063	24	Expedited Investigation	FE	50			Johnny Agency
<input type="checkbox"/>	0000774354	Texas Big State Agency - 988		RC	b67	04/01/2009-08/30/2013	paper aluminum	12/31/2034	35	Legislative Files	AV	20			Johnny Agency
<input type="checkbox"/>	0000774355	Texas Big State Agency - 988	North	RC	89a21	04/01/2009-08/30/2013	snow ice	06/30/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency

Homepage Grid varies from tab to tab. There are three parts to the grid:

1. Pages and Printing
2. The Ribbon
3. Search result items

## PAGES AND PRINTING

Page 1 [ 2 ] [ 3 ] [ 4 ] **5** | Jump to Page:  Go The search found 84 Boxes

**Page 1 [ 2 ] [ 3 ] [ 4 ] [ 5 ]:** How many pages your search generated. The current page always appears outside of brackets in black text. This example shows 84 Boxes were found and the search results spread out over 5 pages. If you want to see more results on the homepage grid:

1. click **Preferences** in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for *Number of records per page displayed in grid*.

**Jump to Page:** Moves you to a specific search results page.

**Print:** Click the printer icon to print a full list of **all** of the search results from all pages.

## THE RIBBON

<input type="checkbox"/>	Box Barcode	Agency Name	Division Name	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
--------------------------	-------------	-------------	---------------	----------	--------------	----------------------	------------------------------------	---------------------------	-----	---------------------	-------------	-------	--------	---------------------	------------------

**Select All Items checkbox:** The orange ribbon details the columns on the grid. While the information in this ribbon varies from tab to tab, one thing that remains constant is the checkbox on the far left on the ribbon. Clicking this checkbox selects every item on this page of the grid.

**TEX SAYS** Clicking the Select All checkbox does not select every item on every page the search generated. If you want to select every item a search generated and you have multiple pages, review the above information in Pages and Printing about adjusting Preferences to see more results.

**Sorting:** To sort the columns of the grid, click a column header that appears in the orange ribbon.

## SEARCH RESULT ITEMS

<input type="checkbox"/>	0000774348	Texas Big State Agency - 988	West	RC	45	01/01/2003-12/31/2014	01 68	06/30/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency
<input type="checkbox"/>	0000774349	Texas Big State Agency - 988	East	RC	a153	1/1/2002-12/31/2007	68a 99	08/31/2017	6	Employee Earnings Records	AC	10			Johnny Agency

**Checkboxes:** Click the checkbox on the left side of the screen to select that item for pickup, delivery, editing, or other action using the dropdowns in the Action Menus.

**Current Location:** This tells where the item currently is. If you see it means the item is in the State Records Center and the exact location is not disclosed for security reasons.

**TeXLinx Homepage**

## NOTES

[illegible]

# Boxes:

## Use 'Create' to Build Boxes

Create is used to create one or many boxes, one container at a time.

The screenshot shows the TEX LINX interface. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLink Resources. Below this, there's a row of tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. Below the tabs, there's a form with various fields: Box Barcode, Organization Quick Description, Box Size, Agency Box #, Drive Date, Eligible Destruction Date, Create Date, Created By Description, Last Modified Date, Destruction Batch #, and Legacy Tracking #. There are 'Search' and 'Clear' buttons, and a link for '(Rollover for Current Search)'. Below the form, there's a row of buttons: Activity, Search and View, Data Manipulation, Data Removal, and Cart. The 'Data Manipulation' button is highlighted, and a dropdown menu is open, showing options: Create, Bulk Create, Data Sheet, Update, Bulk Update, and Search & Replace. A red arrow points to the 'Create' option. Another red arrow points to the 'Boxes' tab. A third red arrow points to the 'Data Manipulation' button.

1. Click the **Boxes** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Create** from the dropdown menu.

### CREATE A NEW BOX screen


The screenshot shows the 'Create a new Box' screen in the TEX LINX interface. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLink Resources. Below this, there's a row of buttons: Save & New, Save & View, Save & Close, Set Defaults, and Cancel. The 'Save & New' button is highlighted. Below the buttons, there's a section for '\*Organization:'. It contains a search bar with 'Agency Name', 'Division Name', 'Business Unit Name', 'Business Sub-Unit Name', and 'Organization Nickname'. Below the search bar, there's a table with columns: Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. The table contains several rows of data, including 'Texas Big State Agency - 988' and 'Texas Big State Agency'. Below the table, there's a section for '\*Record Series:'. It contains a search bar with 'Organization Quick Description', 'AIN', 'RSIN', 'Record Series Title', 'Event Based', and 'Years'. Below the search bar, there's a table with columns: Organization Quick Description, AIN, RSIN, Record Series Title, Event Based, and Years. The table contains several rows of data, including 'Months', 'Days', 'Event Trigger', 'Archival', 'Vital', and 'Remarks'. Below the table, there's a section for '\*Box Size: RC'. Below this, there's a section for '\*Inclusive Date Range:'. Below this, there's a section for '\*Drive Date:'. Below this, there's a section for '\*Agency Box #:'. Below this, there's a section for '\*Beginning File | Ending File Range:'. Below this, there's a section for 'Notes:'. At the bottom, there's a row of buttons: Save & New, Save & View, Save & Close, Set Defaults, and Cancel.

## Boxes: Use 'Create' to Build Boxes

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page does not process without completing these required fields.

### \*Organization

\*Organization:

①  Search Here:  Agency Name  Division Name  Business Unit Name  Sub Business Unit Name  Organization Nickname

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:


Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Select the **Organization** within the agency associated with this box by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### \*Record Series

\*Record Series:

①  Search Here:  Organization Quick Description  AIN  RSIN  Record Series Title  Event Based  Years

Months  Days  Event Trigger  Archival  Vital  Remarks

Legal Citations  Approval Status

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button.

Page 1 | [2] [3] [4] | Jump to Page:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved
<input type="radio"/> Texas Big State Agency - 988	4		Notice of Possible Eligibility		15					False	15-988-004		Approved

**Record Series** is the Record Series Title on the agency's Records Retention Schedule that the box(es) are assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** If there is a Record Series you need that does not appear, contact your agency's Records Management Officer to resolve this issue.

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988 - Central

Search Here:  Agency Name  Division Name  Business Unit Name  Business Sub-Unit Name  Organization Nickname

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

\*Record Series: 2 - Client Questionnaire

Search Here:  Organization Quick Description  AIN  RSIN  Record Series Title  Event Based  Years

Months  Days  Event Trigger  Archival  Vital  Remarks

Legal Citations  Approval Status

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button.

## Boxes: Use 'Create' to Build Boxes

### \*Box Size

\*Box Size: 

RC
RP-36
RP-48

Box Size options are:

- RC — Regular Container (a standard 1.2-cubic-foot box)
- RP-36 — Roll Plan 36" (a large 6"x6"x36" storage box for items that do not fit in an RC box)
- RP-48 — Roll Plan 48" (a large 6"x6"x48" storage box for items that do not fit in an RC box)

### \*Inclusive Date Range

\*Inclusive Date Range:

The **Inclusive Date Range** can be completed in one of two ways:

- Use the same beginning and ending date information for all boxes to be created (if more than one box is being created). This method results in the same Eligible Destruction Date for all of the boxes.
- Use a unique set of beginning and ending inclusive dates for each box to be created. This method results in a different Eligible Destruction Date for each box.

The date information is entered in this format with no spaces:

MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

Example: 12/31/2015-12/31/2015.

**TEX SAYS** Do not use a hyphen within the dates, use a hyphen only to separate the dates.

**Data Example:** 01/01/2007-12/31/2014 or 1/1/2007-12/31/2014 or 1/1/07-12/31/14

### \*Drive Date

\*Drive Date:  

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.


**TEX SAYS** Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

**Data Example:** 12/31/2014

### How these fields look when completed:

\*Box Size:

\*Inclusive Date Range:

\*Drive Date:  

## Boxes: Use 'Create' to Build Boxes

### Override

Override: ☐

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule
- Only years and/or months and/or days are the Total Retention on the agency's Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinX. If a Drive Date different from the TexLinX auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

### \*Agency Box #

\*Agency Box #:

**Agency Box #** is the identification number you assign to this container. The Agency Box # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Box #. The Pipe symbol is explained in Beginning File | Ending File Range.

**Data Example:** H-7765

**TEX SAYS** To accommodate letters and symbols in addition to numbers, this is a text field.

### \*Beginning File | Ending File Range

\*Beginning File | Ending File Range:

The **Beginning File | Ending File Range** is composed of the first and last item in the box. The Pipe symbol is used as a separator between the beginning file name and the ending file name. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.

**Data Example:** Acuff | Zolt

### Notes

Notes:

**Notes** is an optional field used by the agency to assist users to remember something about the box or about the contents of the box.

**Data Example:** Files are arranged alphabetically.

### How these fields look when completed:

Override: ☐

\*Agency Box #:

\*Beginning File | Ending File Range:

Notes:

## Boxes: Use 'Create' to Build Boxes

### Completed: Create a New Box screen:

Fields marked with an \* are required.

\*Organization:

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. <input type="button" value="Search"/> <input type="button" value="Clear"/>				
Page 1   Jump to Page: <input type="text"/> <input type="button" value="Go"/>				
Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

\*Record Series:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years								
Search Here: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. <input type="button" value="Search"/> <input type="button" value="Clear"/>													
Page 1   [ 2 ] [ 3 ] [ 4 ]   Jump to Page: <input type="text"/> <input type="button" value="Go"/>													
Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved
<input type="radio"/> Texas Big State Agency - 988	4		Notice of Possible Eligibility		15					False	15-988-004		Approved
<input type="radio"/> Texas Big State Agency - 988	5		Eligible Cases	AC	2	6				False	15-988-005		Approved
<input type="radio"/> Texas Big State Agency - 988	5		Eligible Cases	AC	2	6				False	15-988-005		Approved
<input type="radio"/> Texas Big State Agency - 988	6		Employee Earnings Records	AC	10				R	False	15-988-006		Approved
<input type="radio"/> Texas Big State Agency - 988	7		Employee Savings Bonds	FE	50				R	False	15-988-007		Approved
<input type="radio"/> Texas Big State Agency - 988	8		Employee Deduction Authorizations	FE	50				R	False	15-988-008		Approved
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

\*Box Size:

\*Inclusive Date Range:

\*Drive Date:

Override: ☐

\*Agency Box #:

\*Beginning File | Ending File:

Notes:

## Boxes: Use 'Create' to Build Boxes

### Saving

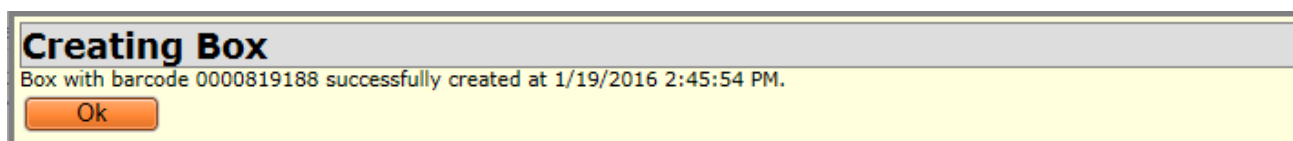


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Box screen's top right:

- **Save & New:** Use this to create another box. For convenience, some fields will carry forward to eliminate repeated data entry. Fields carried forward are still editable.
- **Save & View:** Use this if you have entered only one box and you are ready to make a Request Pickup.
- **Save & Close:** Use this if:
  - You have been selecting Save & New for a set of boxes and you are ready to make a Request Pickup for the boxes.
  - or
  - You want to save the information you have entered for the box(es) but you are not yet ready to make a Request Pickup for the box(es).

### Creating Box dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New Box screen, an error message appears at the top of the screen. Correct the error message and click the save option you selected.

When the above screen appears, it includes the Box Barcode that was generated for this box. The Box Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New Box screen appears. Some fields carried forward from the previous box created but all fields are editable.
- **Save & View:** View a Box is the screen for you to review the box you just created. The box has been saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the box if you are ready to make the request.
- **Save & Close:** The boxes have been saved in TexLinx and the Box homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.

### Boxes: Use 'Create' to Build Boxes

## NOTES

[illegible]

### Boxes: Use 'Create' to Build Boxes

## NOTES

[illegible]

# Boxes:

## Use 'Data Sheet' to Build Multiple Boxes

**Data Sheet** is used to create multiple boxes for a single **Organization** and for a single **Record Series Title** using a format similar to a spreadsheet. Multiple Box Sizes and Inclusive Dates can also be used on the Data Sheet. This is an alternative to using Create, Save & New.

**TEX SAYS** Be mindful of the 20-minute timer at the top of the screen. If you start a data sheet and go for a period of time without clicking a radio button or saving your information, TexLinx times-out your login and your information is lost. You can always select Save & Close to save the information you have entered, move the items to the cart, and come back later to finish. If you do not place them in the cart, you will have to perform a Search to find the items you saved.

The screenshot shows the TexLinx web application interface. At the top is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLinx Resources. Below this is a secondary navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. In the main content area, there are several input fields for Box Barcode, Organization Quick Description, Box Size, Agency Box #, Drive Date, and Eligible Destruction Date. Below these are buttons for Search, Clear, and a rollover for the current search. On the left, there is an 'Activity' dropdown menu. The 'Data Manipulation' option is highlighted, and its dropdown menu is open, showing options like Create, Bulk Create, Data Sheet, Update, Bulk Update, and Search & Replace. The 'Data Sheet' option is selected, indicated by a red arrow and the number 3.

1. Click the **Boxes** item type tab.
2. Click **Data Manipulation** in the Action Menu.
3. Select **Data Sheet** from the dropdown menu.

### CREATE NEW BOXES data sheet

Fields marked with an \* are required.

\*Organization:

Agency Name Division Name Business Unit Name Business Sub-Unit Name Organization Nickname

Search Here: [ ] [ ] [ ] [ ] [ ]

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. [Search] [Clear]

Page 1 | Jump to Page: [ ] Go

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			

\*Record Series:

Organization Quick Description AIN RSIN Record Series Title Event Based Years

Search Here: Months Days Event Trigger Archival Vital Remarks

Legal Citations Approval Status

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. [Search] [Clear]


Box Size*	Inclusive Date Range*	Drive Date*	Override	Agency Box #*	Beginning File   Ending File Range*	Notes
RC	✓					
RC	✓					
RC	✓					
RC	✓					

## Boxes: Use 'Data Sheet' to Build Multiple Boxes

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

**1**  Search Here:  Agency Name  Division Name  Business Unit Name  Sub Business Unit Name  Organization Nickname

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:


Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			

Select the **Organization** within the agency associated with this set of boxes by clicking the button on the left side of the screen or use the Quick Search fields **(1)** to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### \*Record Series

\*Record Series:

**1**  Search Here:  Organization Quick Description  AIN  RSIN  Record Series Title  Event Based  Years

Months  Days  Event Trigger  Archival  Vital  Remarks

Legal Citations  Approval Status

Current Search: Find all Record Series where Record Series Title Contains 'reports'.

Page 1 | Jump to Page:


Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

**Record Series** is the boxes' assigned Record Series Title on the agency's Records Retention Schedule. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields **(1)** to narrow the selection of available Record Series Titles.

**TEX SAYS** If there is a Record Series you need that does not appear, contact your agency's Records Management Officer to resolve this issue.

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988 - Central


**1**  Search Here:  Agency Name  Division Name  Business Unit Name  Sub Business Unit Name  Organization Nickname

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			

\*Record Series: 9 - External Reports

**1**  Search Here:  Organization Quick Description  AIN  RSIN  Record Series Title  Event Based  Years

Months  Days  Event Trigger  Archival  Vital  Remarks

Legal Citations  Approval Status

Current Search: Find all Record Series where Record Series Title Contains 'reports'.

Page 1 | Jump to Page:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input checked="" type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

## Boxes: Use 'Data Sheet' to Build Multiple Boxes

### Data Fields

Box Size*	Inclusive Date Range*	Drive Date*	Override	Agency Box #*	Beginning File   Ending File Range*	Notes
RC	✓		<input type="checkbox"/>			

There are up to eight data field columns to complete for each line of information on the Data Sheet. Most of these are completed the same way they were in Boxes: Use 'Create' to Build Boxes. The only exception is a checkbox to activate the container data entry row.

**TEX SAYS** *Columns are the sections of data found horizontally, left to right. Rows are sections of data found vertically, top to bottom.*

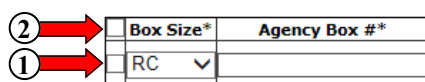
### Setting up the Data Sheet

The data sheet has as many available container data entry rows as your Preferences allow. Keep in mind that the data sheet processes with container data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that.

To increase/decrease the number of container data entry lines in the data sheet:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for *Number of records per page displayed in grid*.
4. click **Save**.

### \*Activate Container Row Checkbox



The first thing to do when creating a container using Data Sheet is to click the checkbox **(1)** on the left side of the data sheet for each container you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a container, click the checkbox **(2)** at the top of the data sheet on the left side of the column label names. This automatically activates each container row.

**TEX SAYS** *Any line activated with a checkbox must be completed when the data sheet is processed. Do not click the checkbox for more containers than you need.*

### \*Box Size

Box Size*
RC ✓

**Box Size** options are:

- RC — Regular Container (a standard 1.2-cubic-foot box)
- RP-36 — Roll Plan 36" (a large 6"x6"x 36" storage box for items that do not fit in an RC box)
- RP-48 — Roll Plan 48" (a large 6"x6"x 48" storage box for items that do not fit in an RC box)

**TEX SAYS** *It is possible to have different Box Sizes for some or all containers on the data sheet.*

### How the data sheet looks for three containers so far:

Box Size*	Inclusive Date Range*	Drive Date*	Override	Agency Box #*	Beginning File   Ending File Range*	Notes
✓ RC	✓		<input type="checkbox"/>			
✓ RC	✓		<input type="checkbox"/>			
✓ RC	✓		<input type="checkbox"/>			

## Boxes: Use 'Data Sheet' to Build Multiple Boxes

### \*Inclusive Date Range

Inclusive Date Range*

The **Inclusive Date Range** can be completed in one of two ways:

- Use the same beginning and ending date information for all boxes created. This method results in the same Eligible Destruction Date for all of the boxes.
- Use a unique set of beginning and ending inclusive dates for some or all of the boxes to be created. This method results in a different Eligible Destruction Date for each box.

The date information is entered in this format with no spaces: MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

Example: 12/31/2015-12/31/2015.

**TEX SAYS** *As with Box Size, the Inclusive Dates on the data sheet can be the same or a different set of dates for each container. Do not use hyphens within each date, use the hyphen only to separate the dates.*

**Data Example:** 03/01/2014-02/28/2015 or 3/1/2014-2/28/2015 or 3/1/14-2/28/15

### \*Drive Date

Drive Date*

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**TEX SAYS** *Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.*

**Data Example:** 2/28/2015

### Override

Override
<input type="checkbox"/>

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency's Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

### How the data sheet looks for three containers so far:

Box Size*	Inclusive Date Range*	Drive Date*	Override	Agency Box #*	Beginning File   Ending File Range*	Notes
✓ RC	✓ 03/01/2014-02/28/2015	02/28/2015	<input type="checkbox"/>			
✓ RC	✓ 03/01/2014-02/28/2015	02/28/2015	<input type="checkbox"/>			
✓ RC	✓ 03/01/2014-02/28/2015	02/28/2015	<input type="checkbox"/>			

## Boxes: Use 'Data Sheet' to Build Multiple Boxes

### \*Agency Box #

Agency Box #*

**Agency Box #** is the identification number you assign to this container. The Agency Box # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Box #. The Pipe symbol is explained below in Beginning File | Ending File Range.

**TEX SAYS** To accommodate letters and symbols in addition to numbers, this is a text field.

**Data Example:** 775

### \*Beginning File | Ending File Range

Beginning File/Ending File Range*

The **Beginning File | Ending File Range** is composed of the first and last item in the box. The Pipe symbol is used as a separator between the beginning file name and the ending file name. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.

**Data Example:** File 550 | File 935

### Notes

Notes

**Notes** is an optional field used by the agency to assist users to remember something about the box or about the contents of the box.

**Data Example:** Lake Travis parks and trails

### How the data sheet looks for three containers when completed

Box Size*	Inclusive Date Range*	Drive Date*	Override	Agency Box #*	Beginning File   Ending File Range*	Notes
✓ RC ✓	03/01/2014-02/28/2015	2/28/2015	<input type="checkbox"/>	775	File 550   File 935	
✓ RC ✓	03/01/2014-02/28/2015	2/28/2015	<input type="checkbox"/>	776	File 935   File 998	
✓ RP-48 ✓	03/01/2014-02/28/2015	2/28/2015	<input type="checkbox"/>	Map263	Lake Travis   Same	Lake Travis parks and trails

## Boxes: Use 'Data Sheet' to Build Multiple Boxes

### Completed: Create New Boxes data sheet:

Fields marked with an \* are required.

\*Organization: Texas Big State Agency - 988 - Central

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. <span>Search</span> <span>Clear</span>				
Page 1   Jump to Page: <input type="text"/> <span>Go</span>				
Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			

\*Record Series: 9 - External Reports

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years								
Search Here: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
Months <input type="text"/>	Days <input type="text"/>	Event Trigger <input type="text"/>	Archival <input type="text"/>	Vital <input type="text"/>	Remarks <input type="text"/>								
Legal Citations <input type="text"/>	Approval Status <input type="text"/>												
Current Search: Find all Record Series where Record Series Title Contains 'reports'. <span>Search</span> <span>Clear</span>													
Page 1   Jump to Page: <input type="text"/> <span>Go</span>													
Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input checked="" type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

Box Size*	Inclusive Date Range*	Drive Date*	Override	Agency Box #*	Beginning File   Ending File Range*	Notes
<input checked="" type="checkbox"/> RC	03/01/2014-02/28/2015	2/28/2015	<input type="checkbox"/>	775	File 550   File 935	
<input checked="" type="checkbox"/> RC	03/01/2014-02/28/2015	2/28/2015	<input type="checkbox"/>	776	File 935   File 998	
<input checked="" type="checkbox"/> RP-48	03/01/2014-02/28/2015	2/28/2015	<input type="checkbox"/>	Map263	Lake Travis   Same	Lake Travis parks and trails

### Saving

Save & New Save & Close

When the data sheet is complete, the next step is to **Save** the information. These two options are located at the Create New Boxes data sheet's top right:

- **Save & New:** Use this to create another set of boxes on a new data sheet.
- **Save & Close:** Use this if:
  - You want to save the information you have entered for these boxes
  - or
  - You have been using Save & New and this is the final data sheet.

### Creating Boxes dialogue box

**Creating Box**  
 This will create 3 Boxes. This may take several minutes. Click Ok to continue creating Boxes or Cancel to cancel this operation.
 Ok Cancel

If the above dialogue box does not appear telling you how many boxes are to be created, you are returned to the Create New Boxes data sheet screen. An error message appears at the top of the data sheet screen. Correct the error and click the save option you selected.

When the above screen appears, Click **OK**. Then, if you selected:

- **Save & New:** Another Create New Boxes data sheet screen appears. Some fields carried forward from the previous box created but all fields are editable.
- **Save & Close:** The boxes have been saved in TexLinx and the Boxes homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.

**TEX SAYS** When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of boxes you are creating.

### Boxes: Use 'Data Sheet' to Build Multiple Boxes

## NOTES

[illegible]

### Boxes: Use 'Data Sheet' to Build Multiple Boxes

## NOTES

[illegible]

# Boxes:

## Use ‘Records Series’ to Build Boxes

1. Click the **Records Series** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the Record Series.
3. Click **Search**. (continue on the next page)  
OR
4. Click **Search and View**.
5. Select **Search**. (continue below)

### Search Records Series screen

Enter search information into any fields to find the Record Series Title for which you want to build boxes. Press **Execute**. If your search does not yield the Record Series Title you need (as seen on the next page), contact your agency’s Records Management Officer for assistance.

## Boxes: Use 'Records Series' to Build Boxes

### Search Results screen

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Remarks	Approval Status
Texas Big State Agency - 988	6		Employee Earnings Records	AC	10		15-988-006	Approved
Texas Big State Agency - 988	7		Employee Savings Bonds	FE	50		15-988-007	Approved
Texas Big State Agency - 988	8		Employee Deduction Authorizations	FE	50		15-988-008	Approved
Texas Big State Agency - 988	22		Employee Surveys	US	10		15-988-022	Approved

Regardless of the Search method you used from the previous page, the above screen is your next destination.

Look to the **Record Series Title** column (1) and click the hyperlinked text in the **Organization Quick Description** column (2) to open the Record Series.

### View a Record Series screen

**Organization Information :** Texas Big State Agency - 988

Agency Name: Texas Big State Agency - 988

Division Name:

AIN: 22

RSIN:

Record Series Title: Employee Surveys

Description:

Years: 10

Months:

Days:

Event Based: US

Event Trigger:

Archival:

Vital: ☒

Remarks: 15-988-022

Legal Citations:

Confidentiality: Public

Approval Status: Approved

Item Approval Date:

Schedule Approval Date: 12/30/2014

Boxes for this Record Series: [Query Boxes on Home Page](#) [Create a New Box for this Record Series](#)

This is the **View a Record Series** screen. Click **Create a New Box for this Record Series** (3).



## Boxes: Use 'Records Series' to Build Boxes

## NOTES

[illegible]

# Files

There are three ways to build **Files** in TexLinx:

- I. Create Files from the Files Tab** — if the Box the file goes into is not at your agency or if the Box has not been created in TexLinx. (Begins below)
- II. Create Files from the Boxes Tab** — if the Box exists in TexLinx and the box is at your agency. (Begins on Page 52)
- III. Create Files Using Data Sheet** — to create multiple files without having to click Save & New after each file is created (Begins on Page 57).

**TEX SAYS** *Creating files in TexLinx is optional and not required. There are a couple of good reasons to create files in TexLinx:*

- *It is an electronic inventory of your files and shows the boxes where they are assigned.*
- *To request a file delivery from the State Records Center, the file must appear in TexLinx (as explained on page 133).*

## I: CREATE FILES FROM THE FILES TAB

The screenshot shows the TexLinx interface with the 'Files' tab selected. A red arrow points to the 'Files' tab. Another red arrow points to the 'Data Manipulation' dropdown menu in the 'Search and View' section. A third red arrow points to the 'Create' option in the dropdown menu. The interface includes a top navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TexLinx Resources. Below the navigation bar are tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main area contains a 'Records Series' section with fields for File Barcode, Organization Description, Agency File Name, Agency Sub File Name, Create Date, Created By Description, and Last Modified. There are also buttons for Search, Clear, and a rollover for the current search. At the bottom, there is a 'Page 1 | Jump to Page:' section and a table with columns for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname.

1. Click the **Files** item type tab.
2. Click **Data Manipulation** in the Action Menu.
3. Select **Create** from the dropdown menu.

## CREATE A NEW FILE screen

The screenshot shows the 'Create a new File' screen in TexLinx. At the top, there are buttons for Save & New, Save & View, Save & Close, Set Defaults, and Cancel. Below these buttons is a message: 'Fields marked with an \* are required.' The main form has a section for '\*Organization:' with fields for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. There is also a search bar with the text 'Search Here:'. Below the search bar is a message: 'Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.' There are buttons for Search and Clear. Below the search bar is a 'Page 1 | Jump to Page:' section with a 'Go' button. At the bottom, there is a table with columns for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. The table contains three rows of data: Texas Big State Agency - 988, Texas Big State Agency - 988, and Texas Big State Agency - 988. There are also fields for '\*Agency File Name:', 'Agency Sub File Name:', and 'File Notes:'.


## Files

### TEX SAYS

1. All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.
2. TexLinX cannot be used to place files from your agency into a box that is currently at the State Records Center (SRC). To add files to a box stored at the SRC, request delivery for that box.

### \*Organization

\*Organization:

①  Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Select the **Organization** within the agency associated with this file by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. The Organization selected here should match the Organization associated with the box it is associated.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinX or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### \*Agency File Name

\*Agency File Name:

**Agency File Name** is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also in Appendix: Definitions).

**Data Example:** Acuff, M 8563

### Agency Sub File Name

Agency Sub File Name:

**Agency Sub File Name** is an optional field for additional information assigned to the file.

**Data Example:** Exam results (FY15)

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input checked="" type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

\*Agency File Name: Acuff, M 8563

Agency Sub File Name: Exam results (FY15)

## Files

### File Notes

File Notes:

**File Notes** is an optional field for information on this file.

**Data Example:** passed all exams on first attempt

### How the screen looks when all fields are completed:

\*Organization: Texas Big State Agency - 988

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input type="text"/> Go				
<input checked="" type="radio"/>	Texas Big State Agency - 988			Texas Big State Agency
<input type="radio"/>	Texas Big State Agency - 988	Central		
<input type="radio"/>	Texas Big State Agency - 988	East		
<input type="radio"/>	Texas Big State Agency - 988	West		
<input type="radio"/>	Texas Big State Agency - 988	North		
<input type="radio"/>	Texas Big State Agency - 988	South		

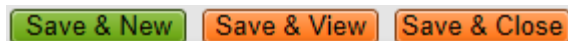
\*Agency File Name: Acuff, M 8563

Agency Sub File Name: Exam results (FY15)

File Notes: passed all exams on first attempt

## Files

### Saving

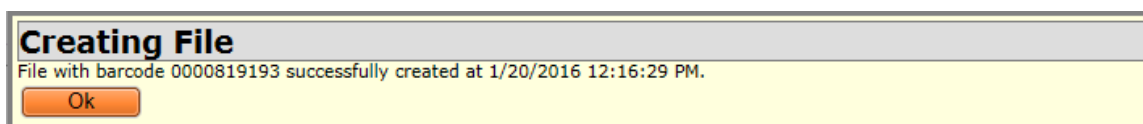


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New File screen's top right:

- **Save & New:** Use this to create another file.
- **Save & View:** Use this if you are ready to place the file in a box that exists in TexLinx and is at your agency.
- **Save & Close:** Use this if:
  1. You have been entering information and you are not yet ready to place the file into a box.
  2. You have been selecting Save & New and you are ready to place the file(s) into a box that exists in TexLinx.
  3. You are not ready to place this file into a box because:
    - a. The box is at the State Records Center.
    - b. The box does not exist in TexLinx.

### Creating File dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New File screen, an error message appears at the top of the screen. Correct the error message and click the save option you selected.

When the above screen appears, it includes the File Barcode that was generated for this file. The File Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New File screen appears. The Organization field carries forward from the previous file created but it is editable.
- **Save & View:** View a File is the screen for you to review the file you just created. The file has been saved in TexLink. Continue on Page 48 (**A. Transferring Files to a Box**) to place the file into a box that is at your agency and the box exists in TexLinx.
- **Save & Close:** The file(s) has/have been saved in TexLinx and the File homepage appears. Continue on the next page to place the file into a box that is at your agency.

**TEX SAYS** *Boxes at the State Records Center cannot have new files added to them. If the box you want to place the file(s) is at the State Records Center, request the box to be delivered so you may add the file(s) to the box — you will not need to re-create the file(s) in TexLinx, follow the steps beginning on page 48 (**A. Transferring Files to a Box**) to place the file into the box in TexLinx when the box is delivered to you. Turn to **Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files\*** to learn how to complete a delivery request for a box that is at the State Records Center.*

## Files

### Place files into a box at your agency

The screenshot shows the 'Files' section of the TEX LINX interface. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLink Resources. Below this, a sub-navigation bar includes Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main area is titled 'Records Series' and contains several input fields: 'File Barcode', 'Organization Quick Description', 'Agency File Name', and 'Agency Sub File Name'. There are also 'Create' buttons for each of these fields. A red arrow labeled '1' points to the 'Agency Sub File Name' field. Another red arrow labeled '2' points to the 'File Barcode' field. A third red arrow labeled '3' points to the 'Create' button for 'Organization Quick Description'. A fourth red arrow labeled '4' points to the 'Search' button in the 'Activity' dropdown menu. The 'Search' button is highlighted in orange. Below the search fields, there's a 'Search' button and a 'Clear' button. A status bar at the bottom right indicates '(0 items) 88'.

If the files you just created do not appear in the homepage grid on the **Files** item type tab page:

1. Enter search information into the **Quick Search** fields.
2. Click **Search** and continue on the next page.

OR

3. Click **Search and View**.
4. Select **Search** and continue below.

**TEX SAYS** See *Appendix: Search* for tips and shortcuts when using Search.

### Search Files screen

The screenshot shows the 'Search Files' screen in the TEX LINX interface. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLink Resources. Below this, a sub-navigation bar includes Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main area is titled 'Search Files' and contains several input fields: 'Organization', 'Agency Name', 'Division Name', 'Business Unit Name', 'Business Sub-Unit Name', and 'Organization Nickname'. There are also 'Search Here' and 'Current Search' sections. A red arrow points to the 'Execute' button in the top right corner. Below the search fields, there's a 'Search' button and a 'Clear' button. A status bar at the bottom right indicates '(0 items) 88'.

Complete any fields (even those in **Infolinx System Fields**) to find the files you need. Once you enter your Search information, click **Execute**.

## Files

### Search Results for Files, Select Files

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 19:35 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production

Records Series

File Barcode Organization Quick Description Agency File Name Agency Sub File Name

Create Date Created By Description Last Modified Date

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

Page 1 | Jump to Page: Go The search found 3 Files

	Organization Quick Description	Agency File Name	Current Location
<input type="checkbox"/>	0000774487 Texas Big State Agency - 988	Bradley, B 0521	Johnny Agency
<input type="checkbox"/>	0000774485 Texas Big State Agency - 988	Cooper, J 9937	Johnny Agency
<input type="checkbox"/>	Texas Big State Agency - 988	Acuff, M 8563	Johnny Agency

These are the files found as a result of your Search.

To select individual files, click the checkbox of that item (1).

To select all files on this screen, click the select all checkbox in the orange ribbon (2).

**TEX SAYS** A setting in Preferences could limit the number of files that appear on a single screen page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the orange ribbon). To increase/decrease the number of files viewable on a single screen page:

1. Click **Preferences** at the top of the screen in the Navigation Menu.
2. Click **Home Page**.
3. Edit the number that appears in the field for **Number of records per page displayed in grid**.
4. Click **Save**.

Adjusting this setting in Preferences results in the homepage grid on all item type tabs to be adjusted.

### A. Transferring Files to a Box

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 18:02 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production

Records Series

File Barcode Organization Quick Description Agency File Name Agency Sub File Name

Create Date Created By Description Last Modified Date

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

Request Delivery  
Request Pickup  
Transfer  
Home Transfer  
Export

The search found 3 Files

	Organization Quick Description	Agency File Name	Current Location
<input type="checkbox"/>	Texas Big State Agency - 988	Bradley, B 0521	Johnny Agency
<input type="checkbox"/>	Texas Big State Agency - 988	Cooper, J 9937	Johnny Agency
<input checked="" type="checkbox"/>	0000819193 Texas Big State Agency - 988	Acuff, M 8563	Johnny Agency

After you have selected the file(s) you want to place into a box:

3. Click **Activity**.
4. Select **Transfer**.

## Files

### B. Transfer Items screen

**Transfer Items** [Transfer] [Cancel]

Items to be transferred:

Change This List [Change This List] Page 1 | Jump to Page: [Go]

Record Description
Bradley, B 0521 0000774487
Cooper, J 9937 0000774485
Acuff, M 8563 0000819193

Items will be transferred to this location:

Enter, scan, or click the Search button to [Search ?]

desired destination: [Make Home Location]

The **Transfer Items** screen. This details the files you have selected (1) to place into a box . To find the box in TexLinx, click **Search** (2).

**TEX SAYS** Do not click the checkbox for **Make Home Location** (3) at any point in this process. The system will activate this checkbox later in the process.

### Search Tabs

**Transfer Items** [Transfer] [Cancel]

Items to be transferred:

Change This List [Change This List] Page 1 | Jump to Page: [Go]

Record Description
Bradley, B 0521 0000774487
Cooper, J 9937 0000774485
Acuff, M 8563 0000819193

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination: [Search ?]

[Individuals] [Boxes] [Locations]

**Individuals Search**

Individuals Barcode	Individual Description	User ID	First Name	Last Name	Email

Role: [ ] Modified Date: [ ]

[Search] [Clear] (Rollover for Current Search)

Page 1 | Jump to Page: [Go] The search found 0 Individuals

Individuals Barcode	User ID	First Name	Last Name	Job Title	Email	Role
---------------------	---------	------------	-----------	-----------	-------	------

[Make Home Location]

When you click the **Search** button, the above Search tabs appear. Click the **Boxes** tab. Remember, the white tab is the tab you where you are working. Orange tabs are the ones where you are not working.

## Files

### Search Tabs: Boxes

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 19:56 Logout

**Transfer Items** Transfer Cancel

Items to be transferred:

Change This List Page 1 | Jump to Page:  Go

Record Description
Bradley, B 0521 0000774487
Cooper, J 9937 0000774485
Acuff, M 8563 0000819193

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination:

Individuals Boxes Locations

Box Barcode  Organization Quick Description  Box Size  Agency Box #  Drive Date  Eligible Destruction Date

Create Date  Created By Description  Last Modified Date  Destruction Batch #  Legacy Tracking #

Search Clear (Rollover for Current Search)

Page 1 | Jump to Page:  Go The search found 0 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File Ending File Range	Eligible Destruction Date	Record Series AIN	Title	Event Based	Years	Months	Destruction Batch #	Current Location
-------------	--------------------------------	----------	--------------	----------------------	----------------------------------	---------------------------	-------------------	-------	-------------	-------	--------	---------------------	------------------

☐ Make Home Location

Complete any of the **Quick Search** fields (1) to find the Box where you want to place the File(s) and click **Search** (2).

### Select the Box

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 19:49 Logout

**Transfer Items** Transfer Cancel

Items to be transferred:

Change This List Page 1 | Jump to Page:  Go

Record Description
Bradley, B 0521 0000774487
Cooper, J 9937 0000774485
Acuff, M 8563 0000819193

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination:

Individuals Boxes Locations

Box Barcode  Organization Quick Description  Box Size  Agency Box #  Drive Date  Eligible Destruction Date

Create Date  Created By Description  Last Modified Date  Destruction Batch #  Legacy Tracking #

Search Clear (Rollover for Current Search)

Page 1 | Jump to Page:  Go The search found 2 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File Ending File Range	Eligible Destruction Date	Record Series AIN	Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input checked="" type="radio"/> 0000775	Texas Big State Agency - 988	RC	ar5	5/1/2015-5/15/2015	alpha omega	11/15/2017	5	Eligible Cases	AC	2	6		⚠️
<input checked="" type="radio"/> 0000786468	Texas Big State Agency - 988	RC	1	1/1/2003-12/31/2005	a z	11/15/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency

☐ Make Home Location

Select the box you want to place the file(s) by clicking the button on the left (1). Remember, boxes with ⚠️ in the Current Location column (2) are at the State Records Center (SRC) and cannot have files added to them. If that is where the file to be placed, click Cancel at the top right to stop the transfer and request the box to be delivered from the SRC so you can add the file to the box.

**TEX SAYS** The Organization names for the box and the file should agree.

## Files

### Final Step: Transfer the File(s) to the Box

**TEX LINX**

Home Preferences Reports Requests Admin Dashboard Help Print [TextLink Resources](#) 19:47 Logout

#### Transfer Items

Clicking the Transfer button will move the following items to the ' 0000786468 1' Box

[Change This List](#) Page 1 | Jump to Page:

Record Description
Bradley, B 0521 0000774487
Cooper, J 9937 0000774485
Acuff, M 8563 0000819193

Items will be transferred to this location:  
Enter, scan, or click the Search button to specify the desired destination:

☒ Make Home Location

The page refreshes with the Box you selected (1). Click **Transfer (2)** to complete the process.

### Message dialogue box

**Message**

3 transfers were successful

The above message appears telling you the transfer to the box is complete.

## II: CREATE FILES FROM THE BOXES TAB

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:54 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production Records Series

Box Barcode:  Organization Quick Description:  Box Size:  Agency Box #:  Drive Date:  Eligible Destruction Date:

Create Date:  Created By:  Description:  Last Modified Date:  Destruction Batch #:  Legacy Tracking #:

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart

Search Key Word Search Query View History

Agency Box # Inclusive Date Range Beginning File | Ending File Range Eligible Destruction Date Record Series AIN Title Event Based Years Months Destruction Batch # Current Location

(0 items)

Search for the box where you want to create a file:

1. Click the Boxes Item Type Tab.
2. Enter search information into the **Quick Search** fields.
3. Click **Search** and continue on the next page.
- OR
4. Click **Search and View**.
5. Select **Search** and continue below.

**TEX SAYS** See Appendix: Search for tips and shortcuts for using Search.

### Search Boxes screen

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:53 Logout

Search Boxes Execute Cancel

Organization:

Agency Name:  Division Name:  Business Unit Name:  Business Sub-Unit Name:  Organization Nickname:

Search Here:  Search Clear

Current Search:

Agency Name:  Division Name:  Business Unit Name:  Sub Business Unit Name:

Record Series:

Organization Quick Description:  AIN:  RSIN:  Record Series Title:  Event Based:  Years:

Search Here:  Months:  Days:  Event Trigger:  Archival:  Vital:  Remarks:

Legal Citations:  Approval Status:  Search Clear

Current Search:

AIN:  Record Series Title:  Years:  Months:  Days:  Event Based:  Event Trigger:  Archival:  Confidentiality:

Complete any fields (even those in **Infolinx System Fields**) to find the box you need. Once you enter your Search information, click **Execute**.

## Files

### Selecting the Box


Activity Search and View Data Manipulation Data Removal Cart

Page 1 [2] [3] [4] [5] | Jump to Page:  Go The search found 91 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input type="checkbox"/> 0000774345	Texas Big State Agency - 988 - North	RC	1	1/1/2003-12/31/2015	a z	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/> 0000774346	Texas Big State Agency - Central	RC	24	1/1/2003-12/31/2015	0001 0085	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/> 0000774348	Texas Big State Agency - 988 - East	RC	45	1/1/2003-12/31/2014	01 68	06/30/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency
<input type="checkbox"/> 0000774349	Texas Big State Agency - 988 - East	RC	a 53	1/1/2002-12/31/2007	68a 99	12/31/2015	2	Client Questionnaire		8			Johnny Agency
<input type="checkbox"/> 0000774350	Texas Big State Agency - 988 - East	RP-36	60	1/1/2004-12/31/2005	ac001 zy026	08/31/2056	7	Employee Savings Bonds FE		50			Johnny Agency
<input type="checkbox"/> 0000774351	Texas Big State Agency - 988 - East	RC	10	1/1/2009-12/31/2010	days months	12/31/2020	6	Employee Earnings Records	AC	10			Jane Division
<input type="checkbox"/> 0000774352	Texas Big State Agency - 988 - East	RC	77	1/1/2015-12/31/2015	Issue 2015-01.23   Issue 2015-01.29	12/31/2025	6	Employee Earnings Records	AC	10			Johnny Agency

Select the box that you want to create a file by clicking the hypertext link in the **Box Barcode** column.

Two things to remember:

- Files can be added to one box at a time.
- Boxes with  in the Current Location column are at the State Records Center and they are prohibited from having files added to them. If you need to add a file to any box that is at the State Records Center, request the box to be delivered. Turn to ***Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files\**** to learn how to complete a delivery request for a box.

### Creating a File from the View a Box page

Activity Search and View Data Manipulation Data Removal Cart

Legacy Tracking #:


Accessioned: ☒


Permanent Withdrawal: ☐


Locked Down:

Holds: ☒ Hold Type

- ☐ Administrative
- ☐ Audit
- ☐ Fiscal
- ☐ Legal
- ☐ Public Information

Current Location:  Johnny Agency

Home Location: 

Hub Location:  SRC - 000085998

0000774346 24 contents: 0 Files Add New

Infomix System Fields

Deleted: ☐

Box Barcode: 0000774346

On the **View a Box** screen, scroll down the page (1) to find the green file icon. Click **Add New** (2).

## Files

### Create a New File screen

### \*Organization

**Organization** populates based upon the Organization assignment for the box.

### \*Agency File Name

**Agency File Name** is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also in **Appendix: Definitions**).

**Data Example:** Print Requests ending 2016-01-15

### Agency Sub File Name

**Agency Sub File Name** is an optional field for additional information assigned to the file outside of the Agency File Name.

**Data Example:** Employee Incentives

### How these fields look when completed:

## Files

### File Notes

File Notes:

**File Notes** is an optional field for information on this file.

**Data Example:** First half of January 2015

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988 - Central

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input type="text"/> Go				
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			

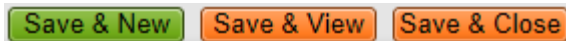
\*Agency File Name: Print Requests ending 2016-01-15

Agency Sub File Name: Employee Incentives

File Notes: First half of January 2015

## Files

### Saving



When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New File screen's top right:


- **Save & New:** Use this to create another file for this box.
- **Save & View:** Use this to review the file you just created and to see the box where it is located (1) in TexLinx.
- **Save & Close:** Use this if:
  - You have entered information for one file and it is the only file you need to add to this box
  - OR
  - You have selected Save & New and this is the last file to add to this box.

Organization Information : Texas Big State Agency - 988 - Central

Agency Name: Texas Big State Agency - 988  
Division Name: Central

Agency File Name: Print Requests ending 2016-01-15  
Agency Sub File Name: Employee Incentives  
File Notes: First half of January 2015

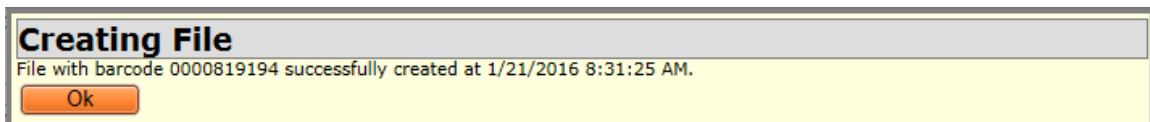
Locked Down: No

Current Location: 0000774346 24 

Home Location: 0000774346 24

Hub Location: SRC - 0000085998

### Creating File dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New File screen, an error message appears at the top of the screen. Correct the error message and click the save option you selected.

When the above screen appears, it includes the File Barcode that was generated for this file. The File Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New File screen appears. The Organization field carries forward from the previous file created but it is editable.
- **Save & View:** View a File is the screen for you to review the file you just created and to see the box information where the file is located (as illustrated above) in TexLinx.
- **Save & Close:** The file has been saved in TexLinx and the file has been placed into the box in TexLinx.

### III: CREATE FILES USING DATA SHEET

The screenshot displays the TextLinx application interface. At the top, there is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TextLinx Resources, and Logout. Below this is a secondary navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main content area is titled 'Records Series' and contains a form with fields for File Barcode, Organization Quick Description, Agency File Name, Agency Sub File Name, Create Date, Created By Description, and Last Modified Date. A red arrow labeled '1' points to the 'Organization Quick Description' field. Another red arrow labeled '2' points to the 'Last Modified Date' field. Below the form are 'Search' and 'Clear' buttons, with a note '(Rollover for Current Search)'. At the bottom, there is a 'Data Manipulation' dropdown menu. A red arrow labeled '3' points to the 'Data Manipulation' dropdown menu. The dropdown menu is open, showing options: Create, Bulk Create, Data Sheet, Update, Bulk Update, and Search & Replace. The 'File Barcode Organization Quick Desc' tab is selected in the bottom navigation bar.

- ## Create New Files data Sheet

57

## Files

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: Find all Organization where Agency Name Contains '988'. <input type="button" value="Search"/> <input type="button" value="Clear"/>				
Page 1   Jump to Page: <input type="text"/> <input type="button" value="Go"/>				
<input type="radio"/>	Texas Big State Agency - 988			Texas Big State Agency
<input type="radio"/>	Texas Big State Agency - 988	Central		
<input type="radio"/>	Texas Big State Agency - 988	East		
<input type="radio"/>	Texas Big State Agency - 988	West		
<input type="radio"/>	Texas Big State Agency - 988	North		
<input type="radio"/>	Texas Big State Agency - 988	South		

Select the **Organization** within the agency associated with this set of files by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Data Fields

<input type="checkbox"/>	Agency File Name*	Agency Sub File Name	File Notes
--------------------------	-------------------	----------------------	------------

There are up to four data field columns to complete for each line of information on the Data Sheet. Most of these are completed the same way they were in the earlier areas of this section; the only

### Setting up the Data Sheet

The data sheet has as many available file data entry rows as your Preferences allow. Keep in mind that the data sheet processes with file data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that.

To increase/decrease the number of file data entry lines in the data sheet:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for *Number of records per page displayed in grid*.
4. click **Save**.

### \*Activate File Row Checkbox

<input checked="" type="checkbox"/>	Agency File Name*
<input type="checkbox"/>	

The first thing to do when creating a file using Data Sheet is to click the checkbox (1) on the left side of the data sheet for each file you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a file, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row.

**TEX SAYS** Any line activated with a checkbox must be completed when the data sheet is processed. Do not click the checkbox for more containers than you need.

## Files

### \*Agency File Name

Agency File Name*

**Agency File Name** is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also in **Appendix: Definitions**).

**Data Example:** File 2379

### Agency Sub File Name

Agency Sub File Name

**Agency Sub File Name** is an optional field for additional information assigned to the file.

**Data Example:** Router 82

### File Notes

File Notes

**File Notes** is an optional field for information on this file.

**Data Example:** June-Sept 2015

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988 - East

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: Find all Organization where Agency Name Contains '988'.				
<input type="button" value="Search"/> <input type="button" value="Clear"/>				
Page 1   Jump to Page: <input type="text"/> <input type="button" value="Go"/>				
<input type="radio"/>	Texas Big State Agency - 988			Texas Big State Agency
<input type="radio"/>	Texas Big State Agency - 988	Central		
<input checked="" type="radio"/>	Texas Big State Agency - 988	East		
<input type="radio"/>	Texas Big State Agency - 988	West		
<input type="radio"/>	Texas Big State Agency - 988	North		
<input type="radio"/>	Texas Big State Agency - 988	South		

<input type="checkbox"/>	Agency File Name*	Agency Sub File Name	File Notes
<input checked="" type="checkbox"/>	File 2379	Router 82	June-Sept 2015
<input checked="" type="checkbox"/>	File 2380	Router 83	June-Sept 2015
<input checked="" type="checkbox"/>	File 2381	Router 84	June-Sept 2015
<input checked="" type="checkbox"/>	File 2382	Router 85	June-Sept 2015
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

## Files

### Saving

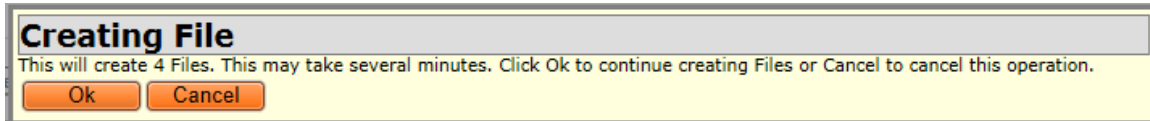


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New File screen's top right:

- **Save & New:** Use this to create another Data Sheet.
- **Save & Close:** Use this if you do not need to complete another Data Sheet.

### Creating File dialogue box



If the above dialogue box does not appear telling you how many boxes are to be created, you are returned to the Create New Boxes data sheet screen. An error message appears at the top of the data sheet screen. Correct the error and click the save option you selected.

When the above screen appears, Click **OK**. Then, if you selected:

- **Save & New:** Another Create New Files data sheet screen appears. The Organization field carried forward from the previous files created but the Organization field is editable.
- **Save & Close:** The files have been saved in TexLinX and the Files homepage appears. **If you are ready to transfer the files to a box, continue on to the next page.**

**TEX SAYS** *When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinX will duplicate the number of files you are creating.*

## Files

### Transferring Files to a Box

Two rules to remember when transferring Files into a Box in TexLinx:

1. The Organization for the Box should match the Organization for the Files.
2. Files are transferred to one Box at a time.

### Place files into a box at your agency

The screenshot shows the 'Records Series' page in the TexLinx application. At the top is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLinx Resources. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main content area has several input fields: 'File Barcode' (with callout 2), 'Organization Quick Description' (with callout 3), 'Agency File Name', 'Agency Sub File Name' (with callout 1), 'Create By', 'Created By', and 'Last Modified Date'. There are 'Search' and 'Clear' buttons, and a link for '(Rollover for Current Search)'. Below the input fields is a 'Search and View' dropdown menu (with callout 4) that is open, showing options like Search, Key Word Search, Query, View, and History. The page also shows a 'Page 1 of 1' indicator and a '(0 items)' status.

If the files you just created do not appear in the homepage grid on the **Files** item type tab page:

1. Enter search information into the **Quick Search** fields.
2. Click **Search** and continue on the next page.

OR

3. Click **Search and View**.
4. Select **Search** and continue below.

**TEX SAYS** See the Appendix section *Search on tips and shortcuts for using Search*.

### Search Files screen

The screenshot shows the 'Search Files' screen in the TexLinx application. At the top is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLinx Resources. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main content area has several input fields: 'Organization' (with a red arrow pointing to the 'Execute' button), 'Agency Name', 'Division Name', 'Business Unit Name', 'Business Sub-Unit Name', and 'Organization Nickname'. There are 'Search' and 'Clear' buttons. Below these are fields for 'Agency File Name', 'Agency Sub File Name', and 'File Notes'. At the bottom, there is a section for 'Infolinx System Fields' with a 'Deleted' dropdown and a 'File Barcode' field. The page also shows a 'Page 1 of 1' indicator and a '(0 items)' status.

Complete any fields (even those in **Infolinx System Fields**) to find the files you need. Once you enter your Search information, click **Execute**.

## Files

### Search Results for Files, Select Files

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:58 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production

Records Series

File Barcode: Organization Quick Description: Agency File Name: Agency Sub File Name:

Create Date: Created By Description: Last Modified Date:

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

Page 1 | Jump to Page: Go The search found 15 Files

	Organization Quick Description	Agency File Name	Current Location
<input type="checkbox"/>	0000819199 Texas Big State Agency - 988	1	Johnny Agency
<input type="checkbox"/>	0000797476 Texas Big State Agency - 988	2	Johnny Agency
<input type="checkbox"/>	0000797461 Texas Big State Agency - 988	3	Johnny Agency
<input type="checkbox"/>	0000797461 Texas Big State Agency - 988	4	Johnny Agency

These are the files found as a result of your Search.

To select individual files, click the checkbox of that item (1).

To select all files on this screen, click the select all checkbox in the orange ribbon (2).

**TEX SAYS** A setting in Preferences could limit the number of files that appear on a single screen page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the orange ribbon). To increase/decrease the number of files viewable on a single screen page:

1. Click **Preferences** at the top of the screen in the Navigation Menu.
2. Click **Home Page**.
3. Edit the number that appears in the field for **Number of records per page displayed in grid**.
4. Click **Save**.

Adjusting this setting in Preferences results in the homepage grid on all item type tabs to be adjusted.

### A. Transferring Files to a Box

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 18:45 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production

Records Series

File Barcode: Organization Quick Description: Agency File Name: Agency Sub File Name:

Create Date: Created By Description: Last Modified Date:

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

The search found 15 Files

	Organization Quick Description	Agency File Name	Current Location
<input type="checkbox"/>	0000797462 Texas Big State Agency - 988	3	Johnny Agency
<input type="checkbox"/>	0000797461 Texas Big State Agency - 988	4	Johnny Agency

After you have selected the file(s) you want to place into a box:

3. Click **Activity**.
4. Select **Transfer**.

## B. Transfer Items screen

**Transfer Items** [Transfer] [Cancel]

Items to be transferred:

Change This List [Change This List] Page 1 | Jump to Page: [Go]

Record Description
4 0000797461
3 0000797462
2 0000797476
1 0000819199

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination: [Search ?] ☐ Make Home Location

The **Transfer Items** screen. This details the files you have selected (1) to place into a box. To find the box in TexLinX, click **Search** (2).

**TEX SAYS** Do not click the checkbox for **Make Home Location** (3) at any point in this process. The system will activate this checkbox later in the process.

## Search Tabs

**Transfer Items** [Transfer] [Cancel]

Items to be transferred:

Change This List [Change This List] Page 1 | Jump to Page: [Go]

Record Description
4 0000797461
3 0000797462
2 0000797476
1 0000819199

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination: [Search ?]

Individuals [Boxes] [Locations]

Individuals Barcode: [ ] Individual Description: [ ] User ID: [ ] First Name: [ ] Last Name: [ ] Email: [ ]

Role: [ ] Modified Date: [ ]

[Search] [Clear] (Rollover for Current Search)

Page 1 | Jump to Page: [Go] The search found 1 Individual

Individuals Barcode	User ID	First Name	Last Name	Job Title	Email	Role
0000774385	JohnnyAgency	Johnny	Agency	Admin. Staff	NO EMAIL PROVIDED	Records Center User

☐ Make Home Location

When you click the **Search** button, the above Search tabs appear. Click the **Boxes** tab. Remember, the white tab is the tab you where you are working. Orange tabs are the ones where you are not working.

## Search Tabs: Boxes

Individuals [Boxes] [Locations]

Box Barcode: [ ] Agency Name: [ ] Division Name: [ ] Box Size: [ ] Agency Box #: [ ] Drive Date: [ ]

Eligible Destruction Date: [ ] Create Date: [ ] Created By Description: [ ] Last Modified Date: [ ] Destruction Batch #: [ ] Legacy Tracking #: [ ]

[Search] [Clear] (Rollover for Current Search)

Page 1 | Jump to Page: [Go] The search found 0 Boxes

Box Barcode	Agency Name	Division Name	Box Size	Agency Box #	Drive Date	Eligible Destruction Date	Record Series	Event Based	Years	Months	Destruction Batch #	Current Location
-------------	-------------	---------------	----------	--------------	------------	---------------------------	---------------	-------------	-------	--------	---------------------	------------------

☐ Make Home Location

Complete any of the **Quick Search** fields (1) to find the Box where you want to place the File(s) and click **Search** (2).

## Files

### Select the Box

**Transfer Items** [Transfer] [Cancel]

Items to be transferred:

Change This List [Change This List] Page 1 | Jump to Page: [Go]

Record Description
4 0000797461
3 0000797462
2 0000797476
1 0000819199

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination:

[Individuals] [Boxes] [Locations]

Box Barcode: [0000774352 or 0000774] Organization Quick Description: [ ] Box Size: [ ] Agency Box #: [ ] Drive Date: [ ] Eligible Destruction Date: [ ]

Create Date: [ ] Created By Description: [ ] Last Modified Date: [ ] Destruction Batch #: [ ] Legacy Tracking #: [ ]

[Search] [Clear] (Rollover for Current Search)

Page 1 | Jump to Page: [Go] The search found 4 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input type="radio"/> 0000774352	Texas Big State Agency - 988 - East	RC	77	1/1/2015-12/31/2015	Issue 2015-01.23   Issue 2015-01.29	12/31/2025	6	Employee Earnings Records	AC	10			[Warning Icon] [Info Icon]
<input type="radio"/> 0000774353	Texas Big State Agency - 988	RC	1009	04/01/2009-08/30/2013	water/air	08/31/2063	24	Expedited Investigation	FE	50			[Warning Icon] [Info Icon]
<input type="radio"/> 0000774354	Texas Big State Agency - 988	RC	b67	04/01/2009-08/30/2013	paper/aluminum	12/31/2034	35	Legislative Files	AV	20			[Warning Icon] [Info Icon]
<input type="radio"/> 0000786468	Texas Big State Agency - 988	RC	1	1/1/2003-12/31/2005	al/z	11/15/2020	1	Authorization to Participate Cards	AC	5	6		[Johnny Agency]

☐ Make Home Location

Select the box you want to place the file(s) by clicking the button on the left (1). Remember, boxes with ⚠ in the Current Location column (2) are at the State Records Center and cannot have files added to them. Also, remember the Organization (Agency Name and Division) for Files should match the Organization for Boxes. If the Box where you want to place the Files is at the State Records Center, request the box to be delivered from the State Records Center so you can add the file to the box.

### Final Step: Transfer the File(s) to the Box

**Transfer Items** [Transfer] [Cancel]

Clicking the Transfer button will move the following items to the '0000786468 1' Box

Change This List [Change This List] Page 1 | Jump to Page: [Go]

Record Description
4 0000797461
3 0000797462
2 0000797476
1 0000819199

Items will be transferred to this location:

Enter, scan, or click the Search button to specify the desired destination:

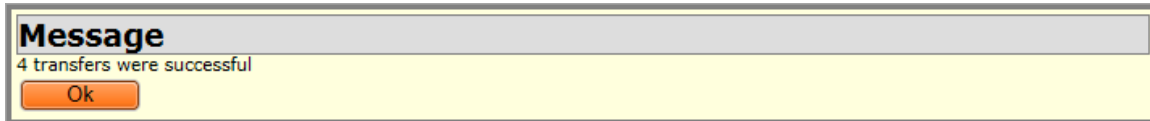
the 0000786468 1 [Search] [Make Home Location]

☒ Make Home Location

The page refreshes with the Box you selected (1). **Make Home Location** is checked (2) automatically. Click **Transfer** (3) to complete the process.

## Files

### Message dialogue box



The above message tells you the transfer of Files to the Box is complete. Click OK and you are returned to the Files homepage grid. You can see the Files' Current Location is in the Box you selected.

The screenshot shows the TEX LINX Files homepage. The top navigation bar includes links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLink Resources. Below this is a secondary navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production. The main content area is titled "Records Series" and contains a search form with fields for File Barcode, Organization Quick Description, Agency File Name, Agency Sub File Name, Create Date, Created By Description, and Last Modified Date. Below the search form are buttons for Search, Clear, and a rollover search option. A toolbar below the search form includes buttons for Activity, Search and View, Data Manipulation, Data Removal, and Cart. The search results section shows "The search found 4 Files" and a table with 4 rows. A red arrow points to the "Current Location" column of the table.

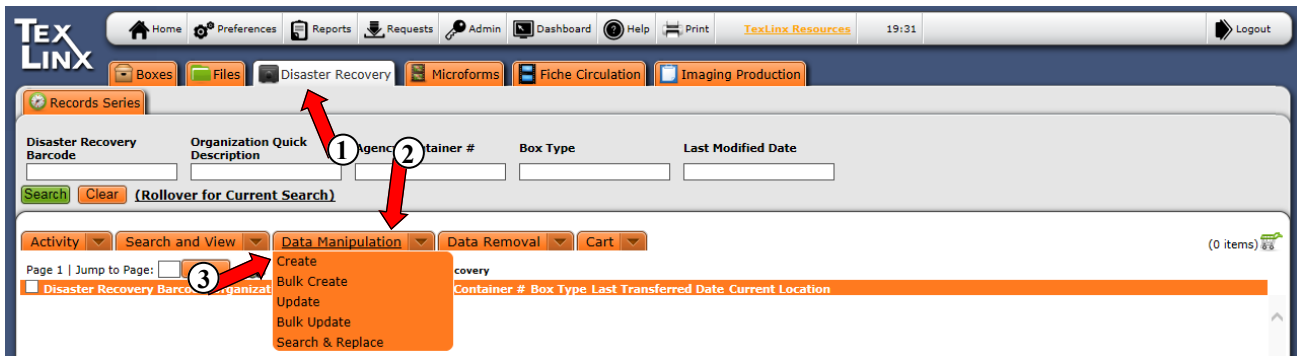
File Barcode	Organization Quick Description	Agency File Name	Current Location
0000819199	Texas Big State Agency - 988	1	0000786468 1
0000797476	Texas Big State Agency - 988	2	0000786468 1
0000797462	Texas Big State Agency - 988	3	0000786468 1
0000797461	Texas Big State Agency - 988	4	0000786468 1

# Files

## NOTES

[illegible]

# Disaster Recovery: Create



1. Click the **Disaster Recovery** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Create** from the dropdown menu.

## Create a new Disaster Recovery screen

The screenshot shows the 'Create a new Disaster Recovery' form in the TEX LINX web application. The form has a header with 'Save & New', 'Save & View', 'Save & Close', 'Set Defaults', and 'Cancel' buttons. Below the header, there's a note: 'Fields marked with an \* are required.' The form is divided into several sections. The first section is labeled '\*Organization:' and contains a search area with fields for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. Below the search area, there's a table with columns for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. The table contains several rows of data, including 'Texas Big State Agency - 988' and 'Texas Big State Agency - 988' with various divisions and locations. The second section is labeled 'Agency Container #:' and contains a text input field. The third section is labeled '\*Box Type:' and contains a dropdown menu with 'RC' selected. The fourth section is labeled '\*Return Type:' and contains a dropdown menu. The fifth section is labeled 'Notes:' and contains a text area.

## Disaster Recovery: Create

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. <input type="button" value="Search"/> <input type="button" value="Clear"/>				
Page 1   Jump to Page: <input type="text"/> <input type="button" value="Go"/>				
Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Select the **Organization** within the agency associated with this box by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Agency Container #

Agency Container #:

**Agency Container #** is the identification number you assign to this container. This is an optional field. The Agency Container # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Container #. The Pipe symbol is used in other tabs for Beginning File | Ending File Range.

**Data Example:** 988-0012

### \*Box Type

\*Box Type:

2RB

3RB

4RB

5RB

RC

**Box Type** is the size of the Disaster Recovery box created in TexLinx.

- 2RB: larger than the size of one Records Center box up to two Records Center boxes.
- 3RB: the size of up to three Records Center boxes.
- 4RB: the size of up to four Records Center boxes.
- 5RB: the size of up to five Records Center boxes.
- RC: regular-sized Records Center box (1.2 cubic foot box).

**TEX SAYS** A State Records Center employee will confirm Box Size and make corrections, if needed.

### How these parts look when completed:

\*Organization:

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. <input type="button" value="Search"/> <input type="button" value="Clear"/>				
Page 1   Jump to Page: <input type="text"/> <input type="button" value="Go"/>				
Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input checked="" type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Agency Container #:

\*Box Type:

## Disaster Recovery: Create

### \*Return Type

\*Return Type:

**Return Type** is the Disaster Recovery box's method of delivery from the State Records Center. **Will Call** is the only option currently available. Someone from your agency must use TexLinX to request delivery when you want this box returned from the State Records Center.

#### **TEX SAYS** *The Disaster Recovery request to pickup/delivery schedule is as follows:*

- *Requests submitted from 11 a.m.-3p.m. will be picked up/delivered the morning of the following regularly-scheduled workday (Monday-Friday).*
- *Requests submitted after 3 p.m. will be picked up/delivered during the afternoon on the following regularly-scheduled workday (Monday-Friday).*
- *Requests submitted until 11 a.m. (Monday-Friday) will be picked up/delivered that afternoon.*

### Notes

Notes:

**Notes** is an optional field used by the agency to assist users to remember something about the box or about the contents of the box.

**Data Example:** Tapes are confidential.

### How the Create a New Disaster Recovery screen looks when all fields are complete:

\*Organization: Texas Big State Agency - 988 - East

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input checked="" type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Agency Container #: 988-0012

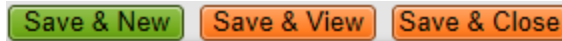
\*Box Type: RC

\*Return Type: Will Call

Notes: Tapes are confidential.

## Disaster Recovery: Create

### Saving

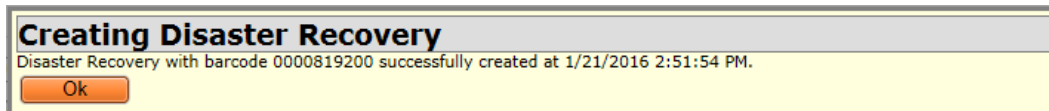


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Disaster Recovery screen's top right:

- **Save & New:** Use this to create another Disaster Recovery box.
- **Save & View:** Use this if you have entered only one Disaster Recovery box and you are ready to make a Request Pickup.
- **Save & Close:** Use this if:
  - You have been selecting Save & New for a set of Disaster Recovery boxes and you are ready to make a Request Pickup for the boxes.or
  - You want to save the information you have entered for the Disaster Recovery box(es) but you are not yet ready to make a Request Pickup for the box(es).

### Creating Disaster Recovery dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New Disaster Recovery screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Box Barcode that was generated for this Disaster Recovery box. The Box Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New Disaster Recovery screen appears.
- **Save & View:** View a Disaster Recovery is the screen for you to review the box you just created. The Disaster Recovery box is saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the Disaster Recovery box if you are ready to make the request.
- **Save & Close:** If you have been clicking Save & New to create a series of Disaster Recovery Boxes, the boxes have been saved in TexLinx and the Disaster Recovery homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.

## Disaster Recovery: Create

## NOTES

[illegible]

## Disaster Recovery: Create

## NOTES

[illegible]

# Microforms: Use ‘Create’ to Build Microfilm

**Create** is used to create one or many microfilm reels one container at a time.

## Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- **16mm Microfilm**
  - **16-2.5mm** (16 millimeter film with a film thickness of 2.5 mil)
  - **16-5mm** (16 millimeter film with a film thickness of 5 mil)
- **35mm Microfilm**
- **Microfiche**

The screenshot shows the TexLinx web interface. At the top, there is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TexLinx Resources, and a Logout button. Below this is a secondary navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms (selected), Fiche Circulation, Imaging Production, and Records Series. The main content area is a form for creating microforms. It includes fields for Microforms Barcode, Organization Quick Description, Agency Name, Division Name, Agency Reel #, Inclusive Date Range, Drive Date, Beginning File | Ending File Range, Create (highlighted with a red arrow and circled with a '2'), Created By Description, Legacy Tracking #, and Last Modified Date. Below the form is a search bar with Search, Clear, and Rollover for Current Search buttons. At the bottom, there is an Action Menu with tabs: Activity, Search and View, Data Manipulation (selected), Data Removal, and Cart. The Data Manipulation dropdown menu is open, showing options: Create (highlighted with a red arrow and circled with a '3'), Bulk Create, Data Sheet, Update, Bulk Update, and Search & Replace. Below the menu is a table header with columns: Microforms Barcode, Organization Quick Description, Agency Reel #, Inclusive Date Range, Film Type, Film Size, Beginning File | Ending File Range, Fiche Count, Current Location, and Home Location. The table currently shows 0 items.

1. Click the **Microforms** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Create** from the dropdown menu.

## Microforms: Use 'Create' to Build Microforms

### CREATE A NEW MICROFORMS screen

TEX  
LINX

[Home](#)
[Preferences](#)
[Reports](#)
[Requests](#)
[Admin](#)
[Dashboard](#)
[Help](#)
[Print](#)
[TexLink Resources](#)
18:57
[Logout](#)

**Create a new Microforms**

[Save & New](#)
[Save & View](#)
[Save & Close](#)
[Set Defaults](#)
[Cancel](#)

Fields marked with an \* are required.

**\*Organization:**

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input style="width: 100%;" type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input style="width: 50px;" type="text"/> <a href="#">Go</a>				
Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

**Imaging Production:**

Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
Search Here: <input style="width: 100%;" type="text"/>					
What are you sending us to be imaged? (Media Type)	What media are we creating?	What size media are we creating?	Duplicate	Type of Duplicate	Addition
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.					

**\*Record Series:**

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
Search Here: <input style="width: 100%;" type="text"/>					
Months	Days	Event Trigger	Archival	Vital	Remarks
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Legal Citations	Approval Status				
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>				
Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button.					

**\*Film Type:**

**\*Film Size:**

**\*Inclusive Date Range:**

**\*Drive Date:**

Override: ☐

**\*Agency Reel #:**

**\*Beginning File | Ending File Range:**

**Fiche Count:**

**Image Count:**

**Addition:**


**Notes:**

## Microforms: Use 'Create' to Build Microforms

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

**1** 

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Select the **Organization** within the agency associated with the microfilm reel(s) by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinX or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Imaging Production

Imaging Production:

Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search Here:

What are you sending us to be imaged? (Media Type)

What media are we creating?

What size media are we creating?

Duplicate

Type of Duplicate

Addition

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

**Imaging Production** is used by the State Records Center when creating storage items produced in Imaging Production. **You do not data enter information into this field.**

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988 - Central

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:

Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search Here:

What are you sending us to be imaged? (Media Type)

What media are we creating?

What size media are we creating?

Duplicate

Type of Duplicate


Addition

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

## Microforms: Use 'Create' to Build Microforms

### \*Record Series

\*Record Series:

① 

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Here: Months	Days	Event Trigger	Archival	Vital	Remarks
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Legal Citations	Approval Status				
<input type="text"/>	<input type="text"/>				

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. Search Clear

Page 1 [ 2 ] [ 3 ] [ 4 ] | Jump to Page:  Go




Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved
<input type="radio"/> Texas Big State Agency - 988	4		Notice of Possible Eligibility		15					False	15-988-004		Approved

**Record Series** is the Record Series Title on the agency's Records Retention Schedule the microfilm reel(s) are to be assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** *If there is a Record Series you need that does not appear, contact your agency's Records Management Officer to resolve this issue.*

### \*Film Type

\*Film Type:

- Duplicate-Diazo
- Duplicate-Microfiche
- Duplicate-Silver 
- Microfiche 
- Original 
- Scans


**Film Type:** The only two options for microfilm stored at the State Records Center are:

- **Duplicate-Silver:** More durable microfilm used for archival and permanent information.
- **Original:** The first generation of a roll of microfilm.

**TEX SAYS** *The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.*

### How these fields look when completed:

\*Record Series:

② 

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Here: Months	Days	Event Trigger	Archival	Vital	Remarks
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Legal Citations	Approval Status				
<input type="text"/>	<input type="text"/>				

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. Search Clear

Page 1 [ 2 ] [ 3 ] [ 4 ] | Jump to Page:  Go

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved

\*Film Type:

## Microforms: Use 'Create' to Build Microforms

### \*Film Size

\*Film Size:

MICROFICHE
MR16-2.5 MIL
MR16-5 MIL
MR35
Scan - B&W 200 DPI
Scan - B&W 300 DPI
Scan - B&W 400 DPI
Scan - B&W 600 DPI
Scan Large Format - 200-300 DPI
Scan Large Format - up to 600 DPI
Scan Microfiche to digital
Scan Microform to Digital

**Film Size:** The only options for microfilm are:

- **MR16-2.5 MIL:** 16 millimeter film with a thickness of 2.5 mil
- **MR16-5 MIL:** 16 millimeter film with a thickness of 5 mil
- **MR35:** 35 millimeter film

**TEX SAYS** 1 mil = 0.001 of an inch

*The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.*

### \*Inclusive Date Range

\*Inclusive Date Range:

The **Inclusive Date Range** can be completed in one of two ways:

- Use the same beginning and ending date information for all microfilm reels to be created (if more than one reel is being created). This method results in the same Eligible Destruction Date for all of the reels.
- Use a unique set of beginning and ending inclusive dates for each microfilm reel to be created. This method results in a different Eligible Destruction Date for each reel.

The date information is entered in this format with no spaces:

MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

Example: 12/31/2015-12/31/2015.

**Data Example:** 01/01/2012-09/30/2015 or 1/1/2012-9/30/2015 or 1/1/12-9/30/12

### How these fields look when completed:

\*Film Size:

\*Inclusive Date Range:

## Microforms: Use 'Create' to Build Microforms

### \*Drive Date

\*Drive Date:  

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**TEX SAYS** Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

**Data Example:** 08/01/2015

### Override

Override: ☐

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency's Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

### \*Agency Reel #


\*Agency Reel #:

**Agency Reel #** is the identification number you assign to this microfilm reel.

The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

**Data Example:** Reel 16

### How these fields look when completed:

\*Drive Date:  

Override: ☐

\*Agency Reel #:

## Microforms: Use 'Create' to Build Microforms

### \*Beginning File | Ending File Range

\*Beginning File | Ending File  
Range:

The **Beginning File | Ending File Range** is composed of the first image on the microfilm reel and the last image on the reel. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** *If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.*

*In the below example, a space appears before and after the Pipe for illustrative purposes only.*

**Data Example:** 2012 Survey | 2015 Survey

### Fiche Count

Fiche Count:

**Fiche Count** is used for microfiche only. **You do not enter information into this field.**

### Image Count

Image Count:

**Image Count** is used by the State Records Center. **You do not enter information into this field.**

### Addition

Addition:

**Addition** is used by the State Records Center. **You do not data enter information into this field.**

### Notes

Notes:

**Notes** is an optional field to assist users to remember something about this microfilm reel.

**Data Example:** 2015 Survey thru the end of September

### How these fields look when completed:

\*Beginning File | Ending File 2012 Survey | 2015 Survey  
Range:

Fiche Count:

Image Count:

Addition:

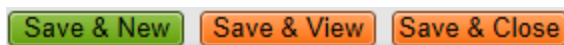
Notes: 2015 Survey thru the end of September

### Completed: Create a New Microforms screen:

80

## Microforms: Use 'Create' to Build Microforms

### Saving

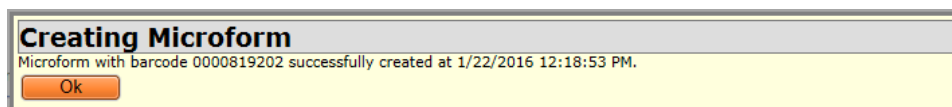


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Microforms screen's top right:

- **Save & New:** Use this to create another microfilm reel.
- **Save & View:** Use this if you have entered only one microfilm reel and you are ready to make a Request Pickup.
- **Save & Close:** Use this if:
  - You have been selecting Save & New for a set of microfilm reels and you are ready to make a Request Pickup for the reels.or
  - You want to save the information you have entered for the microfilm reel(s) but you are not yet ready to make a Request Pickup for the reel(s).

### Creating Microform dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New Microform screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Microform Barcode that was generated for this microfilm reel. The Microform Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New Microform screen appears. Some fields carried forward from the previous reel created but all fields are editable.
- **Save & View:** View a Microform is the screen to review the microfilm reel you just created. The reel has been saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the reel if you are ready to request pickup.
- **Save & Close:** The microfilm reel(s) has/have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your microfilm reel(s) if you are ready to make the request.

## Microforms: Use 'Create' to Build Microforms

## NOTES

[illegible]

# Microforms:

## Use ‘Create’ to Build Microfiche Bundles

**Create** is used to create one or many microfiche bundles one container at a time.

### Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- **16mm Microfilm**
  - **16-2.5mm** (16 millimeter film with a film thickness of 2.5 mil)
  - **16-5mm** (16 millimeter film with a film thickness of 5 mil)
- **35mm Microfilm**
- **Microfiche**

### Bundle Microfiche Jackets

It is a good rule to bundle microfiche jackets before data entering the information into TexLinx. A **jacket** is a single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. A **bundle** is a small collection of microfiche jackets using the same Record Series Title that have been manually separated from a large amount of microfiche jackets.

- Separate the microfiche jackets into bundles. It is a good way to get organized and this helps the State Records Center research and pull microfiche jackets or microfiche bundles when a delivery request is received.
- The bundles can be divided into any amount you like but a good measure is to keep each bundle to less than 200 microfiche jackets.
- When you are completing TexLinx data entry, each bundle you create is a separate container and you need to know the amount of microfiche jackets you have in each bundle.

**TEX SAYS** *When the Imaging Department at the State Records Center creates microfiche jackets from microfilm reels and returns them to an agency, a bundle is created from each reel. If the microfiche jackets are not in protective envelopes, please place an empty envelope or index card at the start and end of each bundle. It is highly suggested that jackets be placed in envelopes.*

1. Click the **Microforms** item type tab.

2. Click **Data Manipulation** in the Action Menus.

3. Select **Create** from the dropdown menu.

1. Click the **Microforms** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Create** from the dropdown menu.

## Microforms: Use 'Create' to Build Microfiche Bundles

### CREATE A NEW MICROFORMS screen

[Home](#)
[Preferences](#)
[Reports](#)
[Requests](#)
[Admin](#)
[Dashboard](#)
[Help](#)
[Print](#)
[TextLinx Resources](#)
18:57
[Logout](#)

Create a new Microforms

[Save & New](#)
[Save & View](#)
[Save & Close](#)
[Set Defaults](#)
[Cancel](#)

Fields marked with an \* are required.

\*Organization:

Agency Name

Division Name

Business Unit Name

Business Sub-Unit Name

Organization Nickname

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

[Search](#)
[Clear](#)

Page 1 | Jump to Page:  [Go](#)

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:

Imaging Production #

Organization Quick Description

Agency Name

Division Name

Contact Name

Contact Phone # (and extension)

Search Here:

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

[Search](#)
[Clear](#)

\*Record Series:

Organization Quick Description

AIN

RSIN

Record Series Title

Event Based

Years

Search Here:

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button.

[Search](#)
[Clear](#)

\*Film Type:

\*Film Size:

\*Inclusive Date Range:

\*Drive Date:

Override:

\*Agency Reel #:

\*Beginning File | Ending File Range:

Fiche Count:

Image Count:

Addition:

Notes:


84

## Microforms: Use 'Create' to Build Microfiche Bundles

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

**1**  Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Select the **Organization** within the agency associated with the microfiche bundle(s) by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Imaging Production

Imaging Production:


Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Here: <input type="text"/>	What are you sending us to be imaged? (Media Type) <input type="text"/>	What media are we creating? <input type="text"/>	What size media are we creating? <input type="text"/>	Duplicate <input type="text"/>	Type of Duplicate <input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Addition <input type="text"/>

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

**Imaging Production** is used by the State Records Center when creating storage items produced in Imaging Production. **You do not enter information into this field.**

### How these fields look when completed:

\*Organization: Texas Big State Agency - 988 - Central

**1**  Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:


Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Here: <input type="text"/>	What are you sending us to be imaged? (Media Type) <input type="text"/>	What media are we creating? <input type="text"/>	What size media are we creating? <input type="text"/>	Duplicate <input type="text"/>	Type of Duplicate <input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Addition <input type="text"/>

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

## Microforms: Use 'Create' to Build Microfiche Bundles

### \*Record Series

\*Record Series:

**1** 

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Here: Months	Days	Event Trigger	Archival	Vital	Remarks
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Legal Citations	Approval Status				
<input type="text"/>	<input type="text"/>				

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. Search Clear

Page 1 [ 2 ] [ 3 ] [ 4 ] | Jump to Page:  Go


Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved
<input type="radio"/> Texas Big State Agency - 988	4		Notice of Possible Eligibility		15					False	15-988-004		Approved

**Record Series** is the Record Series Title on the agency's Records Retention Schedule the microfiche bundle(s) is/are to be assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** *If there is a Record Series you need that does not appear, contact your agency's Records Management Officer to resolve this issue.*

### \*Film Type

\*Film Type:

- Duplicate-Diazo
- Duplicate-Microfiche
- Duplicate-Silver
- Microfiche 
- Original
- Scans

**Film Type:** Select **Microfiche**.

**TEX SAYS** *The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.*

### How these fields look when completed:

\*Record Series:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Here: Months	Days	Event Trigger	Archival	Vital	Remarks
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Legal Citations	Approval Status				
<input type="text"/>	<input type="text"/>				

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. Search Clear

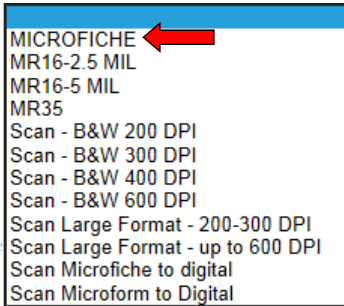
Page 1 [ 2 ] [ 3 ] [ 4 ] | Jump to Page:  Go

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	4		Notice of Possible Eligibility		15					False	15-988-004		Approved

\*Film Type:

## Microforms: Use 'Create' to Build Microfiche Bundles

### \*Film Size

\*Film Size: 

- MICROFICHE
- MR16-2.5 MIL
- MR16-5 MIL
- MR35
- Scan - B&W 200 DPI
- Scan - B&W 300 DPI
- Scan - B&W 400 DPI
- Scan - B&W 600 DPI
- Scan Large Format - 200-300 DPI
- Scan Large Format - up to 600 DPI
- Scan Microfiche to digital
- Scan Microform to Digital

**Film Size:** Select **Microfiche**.

**TEX SAYS** *The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.*

### \*Inclusive Date Range

\*Inclusive Date Range:

The **Inclusive Date Range** can be completed in one of two ways:

- Use the same beginning and ending date information for all microfiche bundles to be created (if more than one bundle is being created). This method results in the same Eligible Destruction Date for all of the reels.
- Use a unique set of beginning and ending inclusive dates for each microfiche bundle to be created. This method results in a different Eligible Destruction Date for each bundle.

The date information is entered in this format with no spaces:

MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

Example: 12/31/2015-12/31/2015.

**Data Example:** 10/15/1998-08/31/2015 or 10/15/1998-8/31/2015 or 10/15/98-8/31/15

### \*Drive Date

\*Drive Date:  

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.


**TEX SAYS** *Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.*

**Data Example:** 08/01/2015

### How these fields look when completed:

\*Film Size: MICROFICHE 

\*Inclusive Date Range: 10/15/1998-08/31/2015

\*Drive Date: 08/31/2015 

## Override

Override: ☐

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency's Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinX. If a Drive Date different from the TexLinX auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

## \*Agency Reel #

\*Agency Reel #:

**Agency Reel #** is the identification number you assign to this microfiche bundle.

The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

**Data Example:** FJ Alden

## \*Beginning File | Ending File Range

\*Beginning File | Ending File Range:

The **Beginning File | Ending File Range** is composed of the first microfiche jacket in the bundle and the last microfiche jacket in the bundle. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** *If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.*

*In the below example, a space appears before and after the Pipe for illustrative purposes only.*

**Data Example:** Alden 10/98 | Zimms 08/15

## \*Fiche Count

\*Fiche Count:

**\*Fiche Count** is the number of microfiche jackets in this bundle.

**Data Example:** 58

## How these fields look when completed:

Override: ☐

\*Agency Reel #: FJ Alden

\*Beginning File | Ending File Range: Alden 10/98 | Zimms 08/15

\*Fiche Count: 58

## Microforms: Use 'Create' to Build Microfiche Bundles

### Image Count

Image Count:

**Image Count** is used by the State Records Center to reflect the number of images in a microfiche bundle created in Imaging Production. **You do not data enter information into this field.**

### Addition

Addition:

**Addition** is used by the State Records Center when images are added to an existing microfiche bundle. **You do not data enter information into this field.**

### Notes

Notes:

**Notes** is an optional field used by the agency to assist users to remember something about this microfiche bundle.

**Data Example:** Missing September 2005, appears in FJ Anderson

### How these fields look when completed:

Image Count:

Addition:

Notes:

## Microforms: Use 'Create' to Build Microfiche Bundles

### Completed: Create a New Microforms screen:

Home

Preferences

Reports

Requests

Admin

Dashboard

Help

Print

TextLinx Resources

12:59

Logout

TEX LINX

Create a new Microforms

Save & New

Save & View

Save & Close

Set Defaults

Cancel

Fields marked with an \* are required.

\*Organization:

Agency Name

Division Name

Business Unit Name

Business Sub-Unit Name

Organization Nickname

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Search

Clear

Page 1 | Jump to Page: 

Go

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:

Imaging Production #

Organization Quick Description

Agency Name

Division Name

Contact Name

Contact Phone # (and extension)

Search Here:

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

Search

Clear

\*Record Series:

Organization Quick Description

AIN

RSIN

Record Series Title

Event Based

Years

Search Here:

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button.

Search

Clear

Page 1 | [2](#) | [3](#) | [4](#) | Jump to Page: 

Go

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	1		Authorization to Participate Cards	AC	5	6			A	False	15-988-001		Approved
<input type="radio"/> Texas Big State Agency - 988	2		Client Questionnaire		8					False	15-988-002		Approved
<input type="radio"/> Texas Big State Agency - 988	3		Data Entry Form	AC	2	6				True	15-988-003		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	4		Notice of Possible Eligibility		15					False	15-988-004		Approved
<input type="radio"/> Texas Big State Agency - 988	5		Eligible Cases	AC	2	6				False	15-988-005		Approved
<input type="radio"/> Texas Big State Agency - 988	6		Employee Earnings Records	AC	10				R	False	15-988-006		Approved
<input type="radio"/> Texas Big State Agency - 988	7		Employee Savings Bonds	FE	50				R	False	15-988-007		Approved
<input type="radio"/> Texas Big State Agency - 988	8		Employee Deduction Authorizations	FE	50				R	False	15-988-008		Approved
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

\*Film Type:

\*Film Size:

\*Inclusive Date Range:

\*Drive Date:

Override: ☐

\*Agency Reel #:

\*Beginning File | Ending File:

Range:

\*Fiche Count:

Image Count:

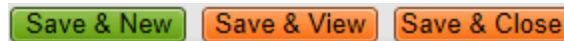
Addition:

Notes:

90

## Microforms: Use 'Create' to Build Microfiche Bundles

### Saving

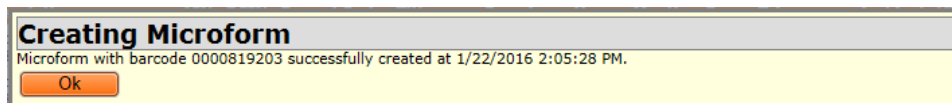


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Microforms screen's top right:

- **Save & New:** Use this to create another microfiche bundle.
- **Save & View:** Use this if you have entered only one microfiche bundle and you are ready to make a Request Pickup.
- **Save & Close:** Use this if:
  - You have been selecting Save & New to create a series of microfiche bundles and you are ready to make a Request Pickup for the bundles.or
  - You want to save the information you have entered for the microfiche bundle(s) but you are not yet ready to make a Request Pickup for the bundle(s).

### Creating Microform dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New Microform screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Microform Barcode that was generated for this bundle of microfiche. The Microform Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New Microform screen appears. Some fields carried forward from the previous reel created but all fields are editable.
- **Save & View:** View a Microform is the screen for you to review the microfiche bundle you just created. The bundle has been saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the bundle if you are ready to make the request.
- **Save & Close:** The microfiche bundle(s) has/have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your microfiche bundle(s) if you are ready to make the request.

### Microforms: Use 'Create' to Build Microfiche Bundles

## NOTES

[illegible]

# Microforms:

## Use ‘Data Sheet’ to Build Multiple Microfilm Reels

**Data Sheet** is used to create multiple microfilm reels **for a single Organization** and **for a single Record Series Title** using a format similar to a spreadsheet. Multiple film sizes and inclusive dates can also be used on the Data Sheet. This is an alternative to using Create, Save & New.

### Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- **16mm Microfilm.**
  - **16-2.5mm** (16 millimeter film with a film thickness of 2.5 mil).
  - **16-5mm** (16 millimeter film with a film thickness of 5 mil).
- **35mm Microfilm.**
- **Microfiche.**

The screenshot shows the TexLinx web interface. At the top, there's a navigation bar with tabs: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TexLinx Resources, and Logout. Below this is a secondary navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms (highlighted), Fiche Circulation, Imaging Production, and Records Series. The main content area has a form with fields for Microforms Barcode, Organization Quick Description, Agency Name, Division Name, Agency Reel #, Inclusive Date Range, Drive Date, Beginning File | Ending File Range, Create, Created By Description, Legacy Tracking #, and Last Modified Date. Below the form is a search bar with Search, Clear, and (Rollover for Current Search) buttons. Under the search bar is a row of buttons: Activity, Search and View, Data Manipulation (highlighted), Data Removal, and Cart. A dropdown menu is open under Data Manipulation, showing options: Create, Bulk Create, Data Sheet (highlighted), Update, Bulk Update, and Search & Replace. Red arrows with numbers 1, 2, and 3 point to the Microforms tab, the Data Manipulation button, and the Data Sheet option in the dropdown menu, respectively.

1. Click the **Microforms** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Data Sheet** from the dropdown menu.

**TEX SAYS** *Be mindful of the 20-minute timer at the top of the screen. If you start a data sheet and go for a period of time without clicking a radio button or saving your information, TexLinx times-out your login and your information is lost. You can always select Save & Close to save the information you have entered, move the items to the cart, and come back later to finish. If you do not place them in the cart, you will have to perform a Search to find the items you saved.*

## CREATE NEW MICROFORMS data sheet


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## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

①  Search Here:  Agency Name  Division Name  Business Unit Name  Sub Business Unit Name  Organization Nickname

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			

Select the **Organization** within the agency associated with the microfilm reels by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Imaging Production

Imaging Production:

Search Here:  Imaging Production #  Organization Quick Description  Agency Name  Division Name  Contact Name  Contact Phone # (and extension)


What are you sending us to be imaged? (Media Type)  What media are we creating?  What size media are we creating?  Duplicate  Type of Duplicate  Addition

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

**Imaging Production** is used by the State Records Center when creating storage items produced in Imaging Production. **You do not enter information into this field.**

### \*Record Series

\*Record Series:

①  Search Here:  Organization Quick Description  AIN  RSIN  Record Series Title  Event Based  Years

Months  Days  Event Trigger  Archival  Vital  Remarks

Legal Citations  Approval Status

Current Search: Find all Record Series where Record Series Title Contains 'reports'.

Page 1 | Jump to Page:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

**Record Series** is the Record Series Title on the agency's Records Retention Schedule that is assigned to the microfilm reels. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** If there is a Record Series you need that does not appear, contact your agency's Records Management Officer to resolve this issue.

## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

### How these fields of the data sheet look when completed:

\*Organization: Texas Big State Agency - 988

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
Search Here:				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input type="text"/> Go				
<input checked="" type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:

Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
Search Here:					
What are you sending us to be imaged? (Media Type)	What media are we creating?	What size media are we creating?	Duplicate	Type of Duplicate	Addition
Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.					

\*Record Series: 10 - Internal Fiscal Management Reports

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years								
Search Here:													
Months	Days	Event Trigger	Archival	Vital	Remarks								
Legal Citations	Approval Status												
Current Search: Find all Record Series where Record Series Title Contains 'reports'.													
Page 1   Jump to Page: <input type="text"/> Go													
Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved
<input type="radio"/> Texas Big State Agency - 988	27		File Reports and Updates	AC	1	6				False	15-988-027		Approved
<input type="radio"/> Texas Big State Agency - 988	28		Restitution Records and Reports		25					False	15-988-028		Approved
<input type="radio"/> Texas Big State Agency - 988	31		Criminal History Check Reports	FE	50				R	False	15-988-031		Approved
<input type="radio"/> Texas Big State Agency - 988	33		Individual Accident Reports	FE	50				R	False	15-988-033	15-988-033	Approved

## Data Fields

Film Type*	Film Size*	Inclusive Date Range*	Drive Date*	Override	Agency Reel #*	Beginning File   Ending File Range*	Fiche Count	Notes

There are up to ten data field columns to complete for each row of information on the data sheet. Most of these are completed the same way they were in **Microforms: Use 'Create' to Build Microfilm**. The only exception is a checkbox to activate each container data entry row.

**TEX SAYS** *Columns* are the sections of data found horizontally, left to right. *Rows* are sections of data found vertically, top to bottom.

## Setting up the data sheet

The data sheet has as many available container data entry rows as your Preferences allow. Keep in mind that the data sheet can process with container data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that.

To increase/decrease the number of container data entry lines in the data sheet:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for *Number of records per page displayed in grid*.
4. click **Save**.

## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

**TEX SAYS** *All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.*

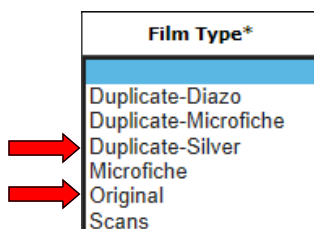
### \*Activate Container Row Checkbox



The first thing to do when creating a container using data sheet is to click the checkbox (1) on the left side of the data sheet for each container you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a container, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row.

**TEX SAYS** *Any row activated with a checkbox is required to be completed when the data sheet is processed. So do not click the checkbox for more containers than you are needing.*

### \*Film Type



**Film Type:** The only two options for microfilm stored at the State Records Center are:

- **Duplicate-Silver:** More durable microfilm used for archival and permanent information.
- **Original:** The first generation of a roll of microfilm.

The other options are either not eligible to be stored at the State Records Center or they are used in conjunction with Imaging Production.

**TEX SAYS** *It is possible to have a different Film Type for some or all containers on the same data sheet.*

*The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.*

### How these fields of the data sheet look when completed:

<input type="checkbox"/>	Film Type*
<input checked="" type="checkbox"/>	Original
<input checked="" type="checkbox"/>	Original
<input checked="" type="checkbox"/>	Duplicate-Silver

## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

### \*Film Size

Film Size*
MICROFICHE
MR16-2.5 MIL
MR16-5 MIL
MR35
Scan - B&W 200 DPI
Scan - B&W 300 DPI
Scan - B&W 400 DPI
Scan - B&W 600 DPI
Scan Large Format - 200-300 DPI
Scan Large Format - up to 600 DPI
Scan Microfiche to digital
Scan Microform to Digital

**Film Size:** The only options for microfilm are:

- **MR16-2.5 MIL:** 16 millimeter film with a thickness of 2.5 mil
- **MR16-5 MIL:** 16 millimeter film with a thickness of 5 mil
- **MR35:** 35 millimeter film

**TEX SAYS** *It is possible to have a different Film Size for some or all containers on the same data sheet. 1 mil = 0.001 of an inch*

*The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.*

### \*Inclusive Date Range

Inclusive Date Range*

The **Inclusive Date Range** can be completed in one of two ways:

- **Use the same beginning and ending date information for all microfilm reels to be created.** This method results in the same Eligible Destruction Date for all of the reels.
- **Use a unique set of beginning and ending inclusive dates for some or all of the microfilm reels to be created.** This method results in a different Eligible Destruction Date for each box.

The date information is entered in this format with no spaces: MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

Example: 12/31/2015-12/31/2015.

**TEX SAYS** *As with Film Type and Film Size, the Inclusive Dates on the data sheet can be the same or a different set of dates for each container. Do not use hyphens within each date, use the hyphen only to separate the dates.*


**Data Example:** 01/01/2014-12/31/2014 or 1/1/2014-12/31/2014 or 1/1/14-12/31/14

### How these fields of the data sheet look when completed:

Film Size*	Inclusive Date Range*
MR16-5 MIL	01/01/2014-12/31/2014
MR16-5 MIL	01/01/2014-12/31/2014
MR35	01/01/2014-12/31/2014

## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

### \*Drive Date

Drive Date*
<input type="text"/> 

The **Drive Date** is a required field.

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**TEX SAYS** *Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.*

**Data Example:** 12/31/2014

### Override

Override
<input type="checkbox"/>

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency's Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

### \*Agency Reel #




Agency Reel #*
<input type="text"/>

**\*Agency Reel #** is the identification number you assign to this microfilm reel.

The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

**Data Example:** 51

### How these fields of the data sheet look when completed:

Drive Date*	Override	Agency Reel #*
12/31/2014 	<input type="checkbox"/>	51
12/31/2014 	<input type="checkbox"/>	52
12/31/2014 	<input type="checkbox"/>	16

## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

### \*Beginning File | Ending File Range

Beginning File   Ending File Range*

The **Beginning File | Ending File Range** is composed of the first image on the reel of film and the last image on the reel of film. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** *If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.*

*In the below example, a space appears before and after the Pipe for illustrative purposes only.*

**Data Example:** Ticket #856 | Ticket #935

### Fiche Count

Fiche Count

**Fiche Count** is used for microfiche only. Leave this field empty for microfilm.

### Notes

Notes

**Notes** is an optional field used by the agency to assist users to remember something about this microfilm reel.

**Data Example:** Combined film reels 51 and 52

### How these fields of the data sheet look when completed:

Beginning File   Ending File Range*	Fiche Count	Notes
Ticket #856   Ticket #935		
Ticket #936   Ticket #999		
Ticket #856   Ticket #999		Comined film reels 51 and 52

**Completed: Create a New Microforms data sheet:**

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## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

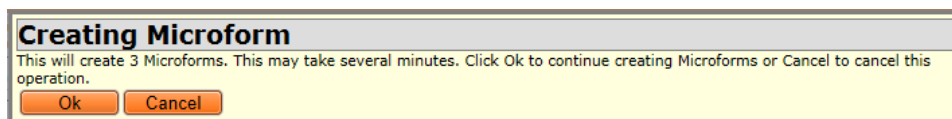
### Saving



When the fields on the data sheet are complete, the next step is to **Save** the information. These two options are located at the Create New Microforms data sheet's top right:

- **Save & New:** Use this to create another set of microfilm reels on a new data sheet.
- **Save & Close:** Use this if:
  - You selected Save & New for a set of microfilm reels and you are ready to make a Request Pickup for the reels.or
  - You want to save the information you have entered for the microfilm reels but you are not yet ready to make a Request Pickup for the reels.

### Creating Microform dialogue box



If the above dialogue box does not appear telling you how many microfilm reels are to be created, you are returned to the Create New Microforms data sheet screen. An error message is at the top of the data sheet screen. Correct the error and click the save option you selected.

When the above screen appears, Click **OK**. Then, if you selected:

- **Save & New:** Another Create New Microforms data sheet appears. Some fields carried forward from the previous microfilm reels created but all fields are editable.
- **Save & Close:** The microfilm reels have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.

**TEX SAYS** *When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of items you are creating.*

## Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

## NOTES

[illegible]

### Microforms: Use 'Data Sheet' to Build Multiple Microfilm Reels

## NOTES

[illegible]

# Microforms:

## Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

**Data Sheet** is used to create multiple microfiche bundles **for a single Organization** and **for a single Record Series Title** using a format similar to a spreadsheet. Multiple inclusive dates can be used on the Data Sheet. This is an alternative to using Create, Save & New.

### Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- **16mm Microfilm**
  - **16-2.5mm** (16 millimeter film with a film thickness of 2.5 mil)
  - **16-5mm** (16 millimeter film with a film thickness of 5 mil)
- **35mm Microfilm**
- **Microfiche**

### Bundle Microfiche Jackets

It is a good rule to bundle microfiche jackets before data entering the information into TexLinx. A **jacket** is a single sheet of microfiche containing many sections of microfilm sliced and inserted into microfiche jackets. A **bundle** is a small collection of microfiche jackets using the same Record Series Title that has been manually separated from a large amount of microfiche jackets.

- Separate the microfiche jackets into bundles. It is a good way to get organized and this helps the State Records Center research and pull microfiche jackets or microfiche bundles when a delivery request is received.
- The bundles can be divided into any amount you like, but a good measure is to keep each bundle to less than 200 microfiche jackets.
- When you are entering data into TexLinx, each bundle you create is a separate container and you will need to know the amount of microfiche jackets you have in each bundle.

**TEX SAYS** *When the Imaging Department at the State Records Center creates microfiche jackets from microfilm reels and returns them to an agency, a bundle is created from each reel.*

*If the microfiche jackets are not in protective envelopes, please place an empty envelope or index card at the start and end of each bundle. It is highly encouraged that jackets be placed in envelopes.*

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

The screenshot shows the TexLinx Microforms interface. At the top, there is a navigation bar with tabs for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TexLinx Resources, and Logout. Below this is a secondary navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The Microforms tab is selected. The main area contains a form with fields for Microforms Barcode, Organization Quick Description, Agency Name, Division Name, Agency Reel #, Inclusive Date Range, Drive Date, Beginning File | Ending File Range, Create, Created By Description, Legacy Tracking #, and Last Modified Date. A red arrow labeled '1' points to the Microforms tab. Another red arrow labeled '2' points to the 'Data Manipulation' dropdown menu. A third red arrow labeled '3' points to the 'Data Sheet' option in the dropdown menu. Below the form is a table with columns for Microforms Barcode, Organization Quick Description, Agency Reel #, Inclusive Date Range, Film Type, Film Size, Beginning File | Ending File Range, Fiche Count, Current Location, and Home Location. The table is currently empty.

1. Click the **Microforms** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Data Sheet** from the dropdown menu.

## CREATE NEW MICROFORMS data sheet

The screenshot shows the 'Create new Microforms' interface in TexLinx. At the top, there is a navigation bar with tabs for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TexLinx Resources, and Logout. Below this is a secondary navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The Microforms tab is selected. The main area contains a form with sections for Organization, Imaging Production, and Record Series. The Organization section has fields for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. The Imaging Production section has fields for Imaging Production #, Organization Quick Description, Agency Name, Division Name, Contact Name, and Contact Phone # (and extension). The Record Series section has fields for Organization Quick Description, ATN, RSTN, Record Series Title, Event Based, Years, Months, Days, Event Trigger, Archival, Vital, and Remarks. Below the form is a table with columns for Film Type, Film Size, Inclusive Date Range, Drive Date, Override, Agency Reel #, Beginning File | Ending File Range, Fiche Count, and Notes. The table is currently empty.


**TEX SAYS** Be mindful of the 20-minute timer at the top of the screen. If you start a data sheet and go for a period of time without clicking a radio button or saving your information, TexLinx times-out your login and your information is lost. You can always select Save & Close to save the information you have entered, move the items to the cart, and come back later to finish. If you do not place them in the cart, you will have to perform a Search to find the items you saved.

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

### \*Organization

\*Organization:

①  Search Here:  Agency Name  Division Name  Business Unit Name  Business Sub-Unit Name  Organization Nickname

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Page 1 | Jump to Page:

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			

Select the **Organization** within the agency associated with the microfiche bundles by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Imaging Production

Imaging Production:

Imaging Production #  Organization Quick Description  Agency Name  Division Name  Contact Name  Contact Phone # (and extension)


Search Here: What are you sending us to be imaged? (Media Type)  What media are we creating?  What size media are we creating?  Duplicate  Type of Duplicate  Addition

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

**Imaging Production** is used by the State Records Center when creating storage items produced in Imaging Production. **You do not enter information into this field.**

### \*Record Series

\*Record Series:

①  Search Here:  Organization Quick Description  AIN  RSIN  Record Series Title  Event Based  Years

Months  Days  Event Trigger  Archival  Vital  Remarks

Legal Citations  Approval Status

Current Search: Find all Record Series where Record Series Title Contains 'reports'.

Page 1 | Jump to Page:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved

**Record Series** is the Record Series Title on the agency's Records Retention Schedule that the microfiche bundles are assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** If there is a Record Series you need that does not appear, contact your agency's Records Management Officer to resolve this issue.

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

### How these parts of the data sheet look when completed:

\*Organization: Texas Big State Agency - 988

Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
Search Here:				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input type="text"/> Go				
Agency Name	Division Name	Business Unit Name	Sub Business Unit Name	Organization Nickname
<input checked="" type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:

Imaging Production #	Organization Quick Description	Agency Name	Division Name	Contact Name	Contact Phone # (and extension)
Search Here:					
What are you sending us to be imaged? (Media Type)	What media are we creating?	What size media are we creating?	Duplicate	Type of Duplicate	Addition
Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.					
Page 1   Jump to Page: <input type="text"/> Go					

\*Record Series: 10 - Internal Fiscal Management Reports

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years								
Search Here:													
Months	Days	Event Trigger	Archival	Vital	Remarks								
Legal Citations	Approval Status												
Current Search: Find all Record Series where Record Series Title Contains 'reports'.													
Page 1   Jump to Page: <input type="text"/> Go													
Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	9		External Reports	AC	3	6				False	15-988-009		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	10		Internal Fiscal Management Reports		10					False	15-988-010		Approved
<input type="radio"/> Texas Big State Agency - 988	27		File Reports and Updates	AC	1	6				False	15-988-027		Approved
<input type="radio"/> Texas Big State Agency - 988	28		Restitution Records and Reports		25					False	15-988-028		Approved
<input type="radio"/> Texas Big State Agency - 988	31		Criminal History Check Reports	FE	50				R	False	15-988-031		Approved
<input type="radio"/> Texas Big State Agency - 988	33		Individual Accident Reports	FE	50				R	False	15-988-033	15-988-033	Approved

## Data Fields

Film Type*	Film Size*	Inclusive Date Range*	Drive Date	Override	Agency Reel #*	Beginning File   Ending File Range*	Fiche Count	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

There are up to ten data field columns to complete for each row of information on the data sheet. Most of these are completed the same way they were in **Microforms: Use 'Create' to Build Microfiche Bundles**. The only exception is a checkbox to activate each container data entry row. **TEX SAYS** *Columns* are the sections of data found horizontally, left to right. *Rows* are sections of data found vertically, top to bottom.

## Setting up the data sheet

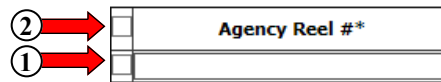
The data sheet has as many available container data entry rows as your Preferences allow. Keep in mind that the data sheet processes with container data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that. To increase/decrease the number of container data entry lines in the data sheet:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for *Number of records per page displayed in grid*.
4. click **Save**.

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page cannot process without completing these required fields.

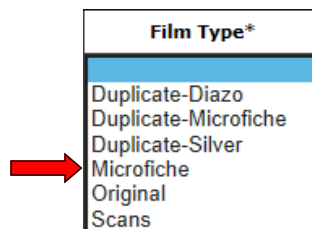
### \*Activate Container Row Checkbox



The first thing to do when creating a container using data sheet is to click the checkbox (1) on the left side of the data sheet for each container you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a container, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row.

**TEX SAYS** Any row activated with a checkbox is required to be completed when the data sheet is processed. So do not click the checkbox for more containers than you are needing.

### \*Film Type

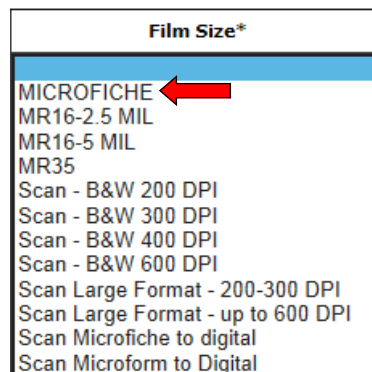


Film Type*
Duplicate-Diazo
Duplicate-Microfiche
Duplicate-Silver
Microfiche
Original
Scans

**Film Type** option is: **Microfiche**

**TEX SAYS** The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.

### \*Film Size



Film Size*
MICROFICHE
MR16-2.5 MIL
MR16-5 MIL
MR35
Scan - B&W 200 DPI
Scan - B&W 300 DPI
Scan - B&W 400 DPI
Scan - B&W 600 DPI
Scan Large Format - 200-300 DPI
Scan Large Format - up to 600 DPI
Scan Microfiche to digital
Scan Microform to Digital

**Film Size** option is: **Microfiche**

**TEX SAYS** The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.

### How these fields of the data sheet look when completed:

<input type="checkbox"/>	Film Type*	Film Size*
<input checked="" type="checkbox"/>	Microfiche	MICROFICHE
<input checked="" type="checkbox"/>	Microfiche	MICROFICHE
<input type="checkbox"/>		

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

### \*Inclusive Date Range

Inclusive Date Range*

The **Inclusive Date Range** can be completed in one of two ways:

- Use the same beginning and ending date information for all created microfiche bundles. This method results in the same Eligible Destruction Date for all of the bundles.
- Use a unique set of beginning and ending inclusive dates for some or all of the microfiche bundles to be created. This method results in a different Eligible Destruction Date for each box.

The date information is entered in this format with no spaces: MM/DD/YYYY-MM/DD/YYYY


If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

**TEX SAYS** Example: 12/31/2015-12/31/2015.

*As with Film Type and Film Size, the Inclusive Dates on the data sheet can be the same or a different set of dates for each container. Do not use hyphens within each date, use the hyphen only to separate the dates.*

**Data Example:** 09/01/2013-08/31/2014 or 9/1/2013-8/31/2014 or 9/1/14-8/31/14

### \*Drive Date

Drive Date*
<input type="text"/> 

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**TEX SAYS** Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

**Data Example:** 08/31/2014

### Override




Override
<input type="checkbox"/>

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency's Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

### How these fields of the data sheet look when completed:

Inclusive Date Range*	Drive Date*	Override
09/01/2013-08/31/2014	08/31/2014 	<input type="checkbox"/>
09/01/2013-08/31/2014	08/31/2014 	<input type="checkbox"/>
		<input type="checkbox"/>

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

### \*Agency Reel #

Agency Reel #*

**Agency Reel #** is the identification number you assign to this microfiche bundle.

The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

**Data Example:** Pages 1-36

### \*Beginning File | Ending File Range

Beginning File   Ending File Range*

The **Beginning File | Ending File Range** is composed of the first microfiche jacket in the bundle and the last microfiche jacket in the bundle. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.

**Data Example:** Administration | Maintenance

### Fiche Count

Fiche Count

**Fiche Count:** Enter the total number of microfiche jackets in this bundle. This is a required field for microfiche.

**Data Example:** 36

### How these fields of the data sheet look when completed:

Agency Reel #*	Beginning File   Ending File Range*	Fiche Count
Pages 1-36	Administration   Maintenance	36
Pages 37-48	Mechanical   Water Office	12



## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

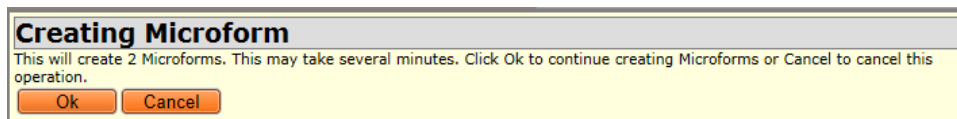
### Saving



When the fields on the data sheet are complete, the next step is to **Save** the information. These two options are located at the Create New Microforms data sheet's top right:

- **Save & New:** Use this to create another set of microfiche bundles on a new data sheet.
- **Save & Close:** Use this if:
  - You have selected Save & New for a set of microfiche bundles and you are ready to make a Request Pickup.
  - or
  - You want to save the information you have entered for the microfiche bundles but you are not yet ready to make a Request Pickup.

### Creating Microform dialogue box



If the above dialogue box does not appear telling you how many microfiche bundles are to be created, you are returned to the Create New Microforms data sheet screen. An error message is at the top of the data sheet screen. Correct the error and click the save option you selected.

When the above screen appears, Click **OK**. Then, if you selected:

- **Save & New:** Another Create New Microforms data sheet appears. Some fields carried forward from the previous microfiche bundles created but all fields are editable.
- **Save & Close:** The microfiche bundles have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.

**TEX SAYS** *When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of items you are creating.*

## Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

## NOTES

[illegible]

# Microforms:

## Use ‘Records Series’ to Build Microfilm Reels and Microfiche Bundles

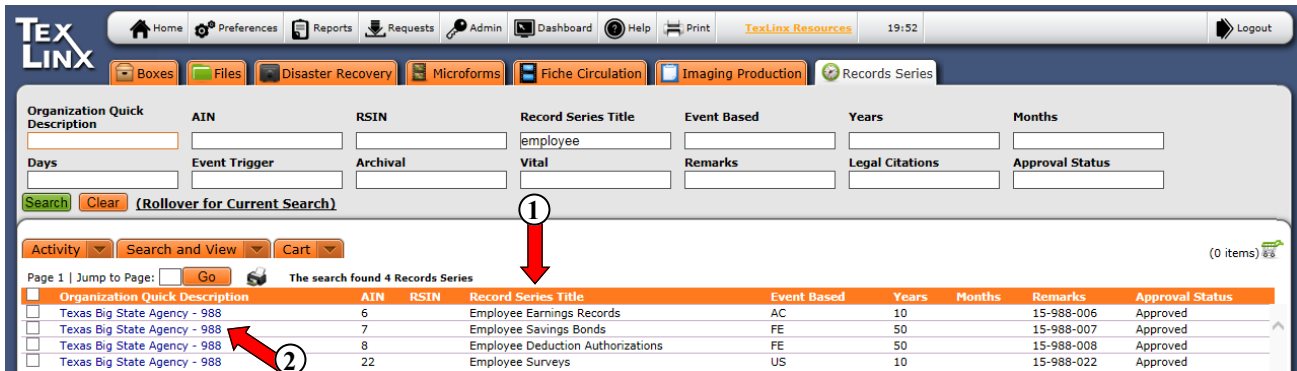
1. Click the **Records Series** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the Record Series for the microform(s).
3. Click **Search**. (continue on the next page).  
OR
4. Click **Search and View**.
5. Select **Search**. (continue below)

### Search Records Series screen

Enter search information into any fields to find the Record Series Title for which you want to build the microform(s). Press **Execute**. If your search does not yield the Record Series Title you need (as seen on the next page), contact your agency's Records Management Officer for assistance.

## Microforms: Use 'Records Series' to Build Microfilm Reels and Microfiche Bundles

### Search Results screen



Organization Quick Description:  AIN:  RSIN:  Record Series Title:  Event Based:  Years:  Months:

Days:  Event Trigger:  Archival:  Vital:  Remarks:  Legal Citations:  Approval Status:

(Rollover for Current Search)

Activity Search and View Cart

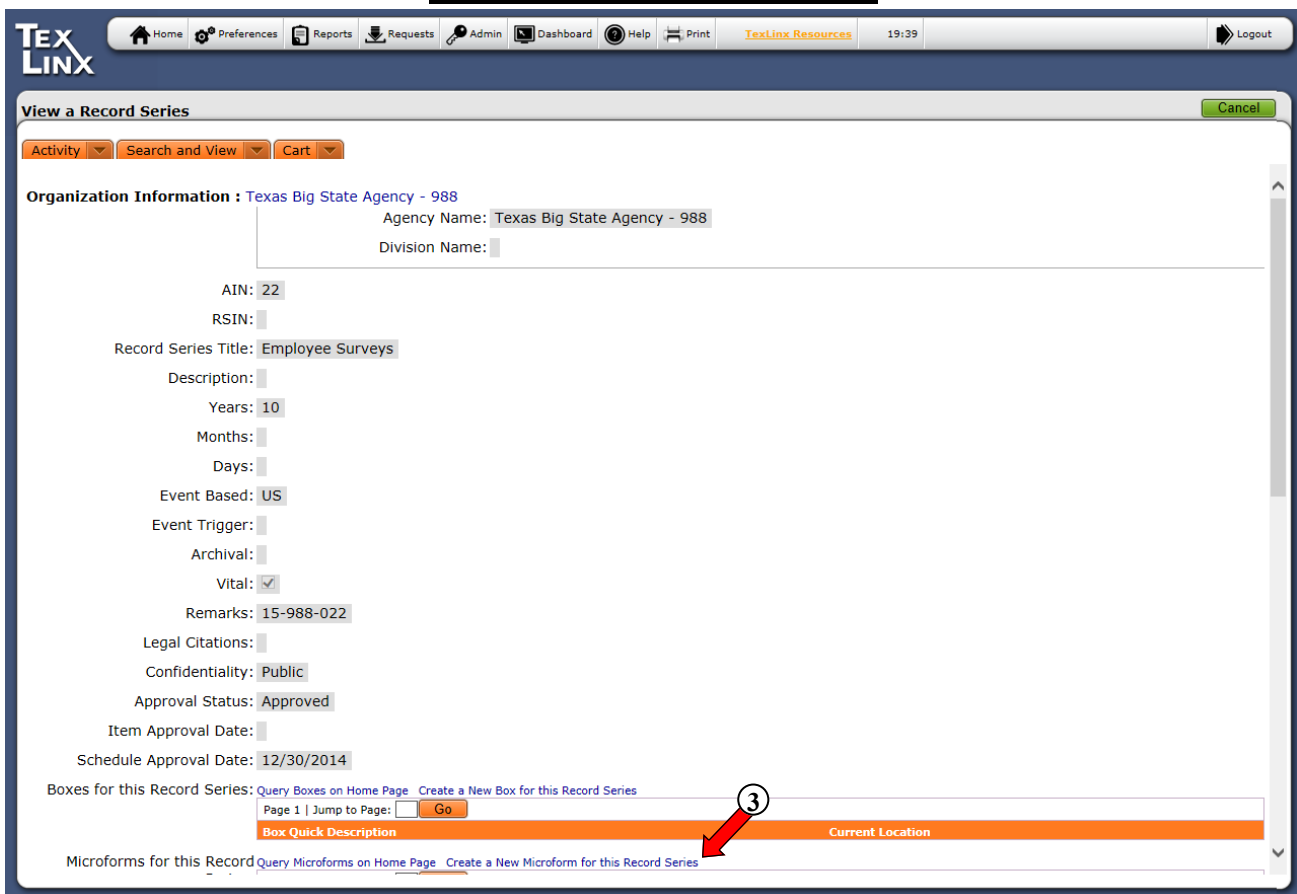
Page 1 | Jump to Page:  Go The search found 4 Records Series (0 items)

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Remarks	Approval Status
<input type="checkbox"/> Texas Big State Agency - 988	6		Employee Earnings Records	AC	10		15-988-006	Approved
<input type="checkbox"/> Texas Big State Agency - 988	7		Employee Savings Bonds	FE	50		15-988-007	Approved
<input type="checkbox"/> Texas Big State Agency - 988	8		Employee Deduction Authorizations	FE	50		15-988-008	Approved
<input type="checkbox"/> Texas Big State Agency - 988	22		Employee Surveys	US	10		15-988-022	Approved

Regardless of the Search method you used from the previous page, the above screen is your next destination.

Look to the **Record Series Title** column (1) and click the hyperlinked text in the **Organization Quick Description** column (2) to open the Record Series.

### View a Record Series screen



View a Record Series

Activity Search and View Cart

Organization Information : Texas Big State Agency - 988

Agency Name: Texas Big State Agency - 988

Division Name:

AIN: 22

RSIN:

Record Series Title: Employee Surveys

Description:

Years: 10

Months:

Days:

Event Based: US

Event Trigger:

Archival:

Vital: ☒

Remarks: 15-988-022

Legal Citations:

Confidentiality: Public

Approval Status: Approved

Item Approval Date:

Schedule Approval Date: 12/30/2014

Boxes for this Record Series: [Query Boxes on Home Page](#) [Create a New Box for this Record Series](#)

Page 1 | Jump to Page:  Go

Microforms for this Record Series: [Query Microforms on Home Page](#) [Create a New Microform for this Record Series](#)

This is the **View a Record Series** screen. Click **Create a New Microform for this Record Series** (3).

## Microforms: Use 'Records Series' to Build Microfilm Reels and Microfiche Bundles

### Create a New Microforms screen

**TEX LINX** Home Preferences Reports Requests Admin Dashboard Help Print [TexLinX Resources](#) 19:40 Logout

Create a new Microforms Save & New Save & View Save & Close Set Defaults Cancel

Fields marked with an \* are required.

\*Organization:

Agency Name Division Name Business Unit Name Business Sub-Unit Name Organization Nickname

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. Search Clear

Page 1 | Jump to Page:  Go

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Imaging Production:

Imaging Production # Organization Quick Description Agency Name Division Name Contact Name Contact Phone # (and extension)

Search Here:  What are you sending us to be imaged? (Media Type) What media are we creating? What size media are we creating? Duplicate Type of Duplicate Addition

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button. Search Clear

Page 1 | Jump to Page:  Go

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="radio"/> Texas Big State Agency - 988	22		Employee Surveys	US	10

\*Record Series: 22 - Employee Surveys

Organization Quick Description AIN RSIN Record Series Title Event Based Years

Search Here:  Months Days Event Trigger Archival Vital Remarks

Legal Citations Approval Status

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. Search Clear

Page 1 | Jump to Page:  Go

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input checked="" type="radio"/> Texas Big State Agency - 988	22		Employee Surveys	US	10					True	15-988-022		Approved

\*Film Type:

\*Film Size:

\*Inclusive Date Range:

\*Drive Date:

Override: ☐

\*Agency Reel #:

\*Beginning File | Ending File Range:

Fiche Count:

Image Count:

Addition:

Notes:

1. Select the **Organization** within your agency that this microform is associated.
2. The Record Series Title you chose from the Records Series tab is a non-editable field.

At this point, continue with to build this microform by selecting the Film Type:

- **Microfilm:** Turn to Page 76, **Microforms: Use 'Create' to Build Microfilm.**
- **Microfiche:** Turn to Page 86, **Microforms: Use 'Create' to Build Microfiche Bundles.**

## Microforms: Use 'Records Series' to Build Microfilm Reels and Microfiche Bundles

## NOTES

[illegible]

# Request Pickup: from Your Agency

Requesting Pickup for boxes, files, disaster recovery, microfilm reels, and microfiche bundles\* is done the same way for each medium but there are two ways to do this depending upon where you are in the process of creating information or returning items to the State Records Center:

- From the **View a Box** (or Disaster Recovery, or Microform) screen immediately after clicking **Save & View** (as seen below) from the single item's Create screen — continue below.  
**TEX SAYS** *Files are excluded from this option since files cannot be created in TexLinx and sent to a box that is at the State Records Center. Please see the section for **Files**.*
- By performing **Search** (turn to Page 120 of this section); this is done:
  - to **return** files, boxes, disaster recovery, or microforms (reels of microfilm and complete microfiche bundles\*) to the State Records Center.
  - to **request first-time pickup** for any number of boxes, disaster recovery containers, or microforms at any point after they have been created in TexLinx and are being sent to the State Records Center for the first time.

\* **TEX SAYS** *For microfiche jacket returns to the State Records Center that were not delivered as the full bundle, see the section **Request Pickup: Returning Microfiche Partial Bundles to the SRC**.*

## After clicking Save & View

The screenshot shows the 'View a Box' interface in the TexLinx system. At the top is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLinx Resources. The main content area has a left sidebar with a dropdown menu under 'Activity'. The dropdown is open, showing options: Request Delivery, Request Pickup (highlighted), and Export. Red arrows and numbers 1 and 2 indicate the steps: 1. Click 'Activity' and 2. Select 'Request Pickup'. The main panel displays details for a box from 'Texas Big State Agency - 988 - Central', including fields for Agency Name, Division Name, Business Unit Name, and Sub Business Unit Name. Below this, 'Record Series Information' is shown for 'Client Questionnaire' with 'AIN: 2' and 'Years: 8'.

After you create an item and click **Save & View** and click **OK** after the item's Barcode dialogue box appears, the **View a Box** (or Disaster Recovery, or Microform) is the next screen. This is where you can review the information you just entered.

To begin the Request Pickup process:

1. Click **Activity**.
2. Select **Request Pickup**

Turn to **Request Items to be Picked Up** screen, page 122.

## Request Pickup: From Your Agency

### Use Search

1. Click the item type tab you are wanting to **Search** (in this example, the Boxes tab is being used).

2. Enter search terms into any of the **Quick Search** fields to find the box or boxes.

3. Click **Search**. (continue on Page 121, **Search Results** screen).

OR

4. Click **Search and View**.

5. Select **Search** (continue below).

### Search Boxes screen

Organization:

Agency Name:  Division Name:  Business Unit Name:  Business Sub-Unit Name:  Organization Nickname:

Search Here:

Current Search:

Record Series:

Organization Quick Description:  AIN:  RSIN:  Record Series Title:  Event Based:  Years:

Search Here:  Months:  Days:  Event Trigger:  Archival:  Vital:  Remarks:

Legal Citations:  Approval Status:

Current Search:

AIN:

Record Series Title:

Years:

Months:

Days:

Event Based:

Event Trigger:

Archival:

Confidentiality:

Enter search information into any fields (including the **Infomix System Fields** on the bottom half of the screen) to find the item(s) that you want to request pickup. Press **Execute**.

## Request Pickup: From Your Agency

### Search Results screen

Regardless of the search method used from the previous page, the above screen is your next destination.

Click the checkbox (1) for the containers you want to request pickup. You can see from the **Current Location** column (2) which boxes are currently with you or someone at your agency. If you see ⚠ (3) in the Current Location column, that indicates the box is already at the State Records Center. Click the checkbox (4) on the orange ribbon if you want to select all\* of the containers.

\* **TEX SAYS** The grid has as many container rows as your Preferences allow. If you need to see or request all of the containers you have searched but they are on multiple pages (5), increase/decrease the number of containers shown:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.

### Request Pickup

After clicking the appropriate checkbox(es) for the item(s) to be picked up from your agency:

1. Click **Activity**.
2. Select **Request Pickup**.

## Request Pickup: From Your Agency

### Request Items to be Picked Up screen

Request Items to be picked up

Items to be picked up:  
Page 1 | Jump to Page:  Go

Change Destination	Record Description	Current Location	Home Location (1)	Destination (2)
<input type="button" value="Apply"/>	0000819190 775	Johnny Agency	SRC - 0000085998	SRC - 0000085998
<input type="button" value="Apply"/>	0000819191 776	Johnny Agency	SRC - 0000085998	SRC - 0000085998
<input type="button" value="Apply"/>	0000819192 Map263	Johnny Agency	SRC - 0000085998	SRC - 0000085998

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

?

Comments:

Depending upon if you are sending items to the State Records Center for the first time (above) or returning items to the SRC (below), your screen looks similar to the illustration above or the illustration below.

#### **Sending items to the State Records Center (SRC) for the first time:**

Your screen looks similar to the above illustration. SRC (and the SRC barcode) appears in the Home Location (1) and Destination (2) columns.

#### **Returning items to the State Records Center (SRC):**

Your screen looks similar to the below illustration. The Home Location (3) is the secure symbol that prevents you from seeing the exact location within the SRC where it was located and the Destination (4) is the barcode for the shelf (or the box in the case of returning files) where it was in the SRC.

Request Items to be picked up

Items to be picked up:  
Page 1 | Jump to Page:  Go

Change Destination	Record Description	Current Location	Home Location (3)	Destination (4)
<input type="button" value="Apply"/>	0000774348 45	Johnny Agency		0000779634

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

?

Comments:

**TEX SAYS** *Since the information is treated the same in both examples, the first illustration is what is used for the remainder of this section.*

## Request Pickup: From Your Agency

### Sections on the Request Items to be Picked Up screen

**Request Items to be picked up**

Items to **1** picked up: Page 1 | Jump to Page:  Go

Change Destination	Record Description	Current Location	Home Location	Destination
<b>2</b> Apply	0000819190 775 <b>3</b>	Johnny Agency <b>4</b>	SRC - 0000085998 <b>5</b>	SRC - 0000085998 <b>6</b>
Apply	0000819191 776	Johnny Agency	SRC - 0000085998	SRC - 0000085998
Apply	0000819192 Map263	Johnny Agency	SRC - 0000085998	SRC - 0000085998
Apply All				

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:  Search **7**

Comments:  **8**

**Recent Request Destinations**

Item Description	Item Barcode	Item Type
Select Jane Division	0000774386	

**9**

- Page Information:** This displays how many screen pages the requested pickup items appear. Ten items per page is the maximum. All items on all pages will be processed with this request.
- Change Destination:** These APPLY buttons are not used on this screen.
- Record Description:** The item barcode and the container number.
- Current Location:** The Current Location defaults to the person who created the item(s) in TexLinx or to the person who received them as a delivery from the State Records Center.
- Home Location:** The Home Location depends upon if this is a pickup request for an item to be stored at the State Records Center (SRC) for the first time, or if it is returning to the SRC.  
**New SRC storage item(s):** the SRC (and the SRC barcode).  
**Item(s) returning to the SRC:** the Secure Location symbol
- Destination:** The Destination depends upon if this is a pickup request for item(s) to be stored at the State Records Center for the first time, or if this is a pickup request for item(s) returning to the SRC.  
**New storage item(s):** the SRC (and the SRC barcode)  
**Item(s) returning to the SRC:** the barcode location where the item originated at the State Records Center.
- Search Location:** This function is not used on this screen.
- Comments:** Type **NEW ACCESSION** if this is a pickup request for an item that has not been stored at the SRC. Also use this field to select an alternative pickup location or person. *See example at the top of the next page.*
- Recent Request Destinations:** Do not use information from this field because the Destination for the items on this screen is going to be the State Records Center, not anyone at your agency.
- Request button:** Click this when this screen is complete and you are satisfied with the information you are providing.

## Request Pickup: From Your Agency

### Modifying the Pickup Location

Comments:

If the pickup location is not at your location, enter the other contact person's name, location at your agency, and phone number here. Include any additional information that may assist the driver from the State Records Center. If an employee at the Texas Big State Agency named Johnny Agency wanted to change the pickup location at his agency to his coworker Jane Division:

Comments:

### Request Results screen

Request Results	
3 requests succeeded	
0000819190 775	Box was successfully submitted
0000819191 776	Box was successfully submitted
0000819192 Map263	Box was successfully submitted

This details what you just submitted to be picked up at your agency.  
The Request Pickup process is complete. Click **OK** to return to the homepage grid.

**To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).**

### Request Pickup: From Your Agency

## NOTES

[illegible]

### Request Pickup: From Your Agency

## NOTES

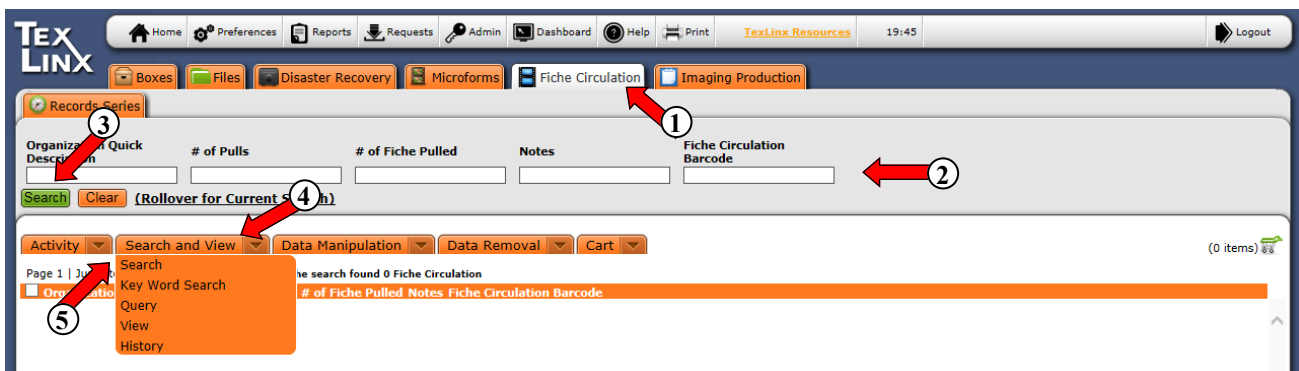
[illegible]

# Request Pickup: Returning Microfiche Partial Bundles to the SRC

The process to Request Pickup for microfiche partial bundles (microfiche jackets that were delivered to you as the result of a Fiche Circulation you created in TexLinx), is similar to returning most items to the State Records Center. From the **Fiche Circulation** tab's homepage, perform a **Search** to find the microfiche jackets to return to the State Records Center.

**TEX SAYS** *For microfiche jacket returns to the State Records Center that were delivered to you as the full bundle, see the section **Request Pickup: From Your Agency**. This section is used only for Microfiche Requests that were created using the Fiche Circulation tab.*

## Use Search



1. Click the **Fiche Circulation** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the Fiche Circulation that was created to deliver these fiche to your agency.
3. Click **Search**. (continue to the bottom of Page 128, **Search Results screen** ).  
OR
4. Click **Search and View**.
5. Select **Search** (continue on the top of the next page).

## Request Pickup: Returning Microfiche Partial Bundles to the State Records Center

### Search Fiche Circulation screen

Enter search information into any fields (including the **Infolinx System Fields**, scroll to the bottom half of the screen) to find the Fiche Circulation that was used to deliver the microfiche jackets to you. Press **Execute**.

### Search Results screen

Fiche Circulation Barcode	Organization Quick Description	# of Pulls	# of Fiche Pulled	Notes	Current Location
0000819232	Texas Big State Agency - 988 - East		246	Addams-Zunn	0000774369 a153
0000819233	Texas Big State Agency - 988 - Central		3	Charles, Jamie Foster, Daniel Melton, Mick	Johnny Agency
0000819234	Texas Big State Agency - 988 - Central		2	00115 05264	0000774383 1455

Regardless of the Search method you used from the previous page, the above illustration is the next screen. Find the Fiche Circulation that was created during the delivery process. You can see the Fiche Circulation items that are in your possession by looking to the Current Location column (1). Your name will appear in this column. In this example Fiche Circulation Barcode 0000819233 is in Johnny Agency's possession (2). The Notes column (3) will detail the Fiche Circulation information. To view more details, click the Barcode (4) for that item. Click the checkbox (5) for the Fiche Circulation you want to return to the State Records Center.

## Request Pickup: Returning Microfiche Partial Bundles to the State Records Center

### Request Pickup

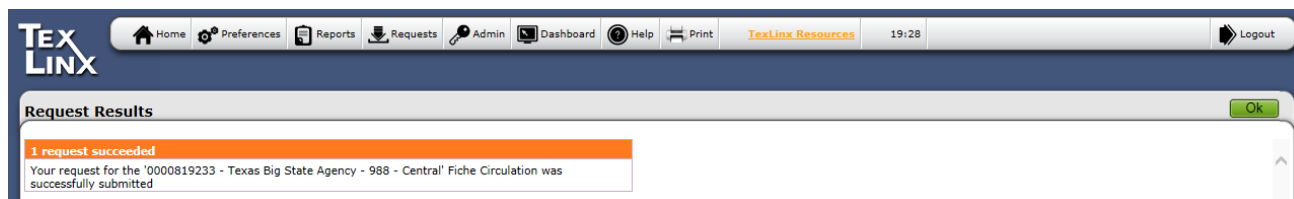
After you have selected the Fiche Circulation(s) you want to return to the State Records Center, click **Activity (1)** then select **Request Pickup (2)**.

### Request Items to be picked up screen

- Page Information:** This displays how many screen pages the requested pickup items appear. Ten items per page is the maximum. All items on all pages will be processed with this request.
- Change Destination:** This APPLY button is not used on this screen.
- Record Description:** The Fiche Circulation barcode and the Organization assigned to it.
- Current Location:** The Current Location defaults to the person who currently has this Fiche Circulation. If this information is not accurate or if the Fiche Circulation is to be picked up in another location, see **Comments** below.
- Home Location:** The Home Location is the Microfiche Bundle stored at the State Records Center.
- Destination:** The Destination is the Microfiche Bundle stored at the State Records Center.
- Search Location:** This function is not used on this screen.
- Comments:** Use this field to provide information that will assist the driving picking up this Fiche Circulation. Also, use this field if this Fiche Circulation is to be picked up from a location other than the person listed as the Current Location on this screen
- Recent Request Destinations:** Do not use information from this field because the Destination for the items on this screen is going to be the State Records Center, not anyone at your agency.
- Request button:** Click this when this screen is complete and you are satisfied with the information you are providing.

## Request Pickup: Returning Microfiche Partial Bundles to the State Records Center

### Request Results screen



This details what you just submitted to be picked up at your agency.  
The Request Pickup process is complete. Click **OK** to return to the homepage grid.

**To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).**

### Request Pickup: Returning Microfiche Partial Bundles to the State Records Center

## NOTES

[illegible]

### Request Pickup: Returning Microfiche Partial Bundles to the State Records Center

## NOTES

[illegible]

# Request Delivery: from the State Records Center Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files\*

\*Files that already appear in TexLinx

Requesting Delivery for boxes, disaster recovery, files, microfilm reels, or microfiche bundles is done the same way for each item type. The reason there are three sections for Request Delivery is because the process is different for files that already exist in TexLinx (that request is completed in this section) than the process for when the files do not currently exist in TexLinx (that request process is explained in the section *Request Delivery from the State Records Center: Files not already entered into TexLinx*). There is also a slightly different process to request delivery of microfiche jackets that are part of a microfiche bundle. That process is explained in the section *Request Delivery from the State Records Center: Microfiche Jackets*.

**TEX SAYS** While the process is similar for all tabs where information in TexLinx appears, in this section, the Boxes tab is used in the illustrations.

## Find the Items to Request Delivery

The screenshot shows the TexLinx web application interface. At the top is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TexLinx Resources. Below this is a tabbed interface with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. The main area contains a 'Quick Search' form with fields for Box Barcode, Organization Quick Description, Box Size, Agency Box #, Drive Date, Eligible Destruction Date, Create Date, Created By, Last Modified Date, Destruction Batch #, and Legacy Tracking #. A 'Search' button is at the bottom left of the form. Below the form is a navigation bar with tabs for Activity, Search and View, Data Manipulation, Data Removal, and Cart. The 'Search and View' tab is selected, and a dropdown menu is open showing options: Search, Key Word Search, Query, View, and History. Red arrows and numbers 1 through 5 indicate the steps: 1. Click the 'Boxes' tab, 2. Enter search terms into any of the Quick Search fields, 3. Click the 'Search' button, 4. Click the 'Search and View' tab, and 5. Select 'Search' from the dropdown menu.

To find the item(s) you need delivered from the State Records Center, there are two ways to perform a search:

- A. 1. Click the item type tab you want to search.
2. Enter search terms into any of the **Quick Search** fields to find the item at the SRC.
3. Click **Search** and continue to **Search Results** screen, Page 134.

**OR**

- B. 4. Click **Search and View**.
5. Select **Search** and continue to **Search Boxes** screen, Page 134.

## Search Boxes screen

Enter search information into any fields (including the **Infomix System Fields** on the bottom half of the screen) to find the item(s) that you want to request delivery. Press **Execute**.

## Search Results screen

Regardless of the Search method you used from the previous page, the above illustration is the next screen.

Click the checkbox (1) for the containers you want to request delivery. You can see from the **Current Location** column (2) which boxes are currently with you or someone at your agency. If you see ⚠ (3) in the Current Location column, that indicates the box is at the State Records Center. Click the checkbox (4) on the orange ribbon if you want to select all\* of the containers.

\* **TEX SAYS** The grid has as many container rows as your Preferences allow. If you need to see or request all of the containers you have searched but they are on multiple pages (5), increase/decrease the number of containers shown:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.

## Request Delivery

Box Barcode:  Organization Quick Description:  Box Size:  Agency Box #:  Drive Date:  Eligible Destruction Date:

Create Date: >12/1/2015 Created By Description:  Last Modified Date:  Destruction Batch #:  Legacy Tracking #:

(Rollover for Current Search)

Activity: **Request Delivery** Search and View:  Data Manipulation:  Data Removal:  Cart:

The search found 7 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input type="checkbox"/> 0000819188	Texas Big State Agency - 988 - Central	RC	H-7765	1/1/2007-12/31/2014	Acuff   Zolt	12/31/2022	2	Client Questionnaire		8			Johnny Agency
<input checked="" type="checkbox"/> 0000819189	Texas Big State Agency - 988 - Central	RC	1	1/1/2003-12/31/2009	a z	12/31/2017	2	Client Questionnaire		8			Johnny Agency
<input type="checkbox"/> 0000819190	Texas Big State Agency - 988 - Central	RC	775	03/01/2014-02/28/2015	File 550   File 935	08/28/2018	9	External Reports	AC	3	6		Johnny Agency
<input type="checkbox"/> 0000819191	Texas Big State Agency - 988 - Central	RC	776	03/01/2014-02/28/2015	File 935   File 998	08/28/2018	9	External Reports	AC	3	6		Johnny Agency

After clicking the appropriate checkbox(es) for the item(s) to be delivered:

1. Click **Activity**.
2. Select **Request Delivery**.

## Sections on the Request Items screen

Request Items

Clicking the Request button **1** move the following items to the 'Johnny Agency' Individual

Change This List  Page 1 | Jump to Page:

Record Description
<input type="button" value="Remove"/> 0000819189 1 <b>2</b>

Enter Number of Files **3**

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination: Johnny Agency **4**

Comments:  **5**

Alternate Fulfillment Method: **6**

1. **Page Information:** This displays how many screen pages the requested pickup items span. Ten items per page is the maximum. If the list of containers is more than one page, all of the containers still process together with this single request.
2. **Record Description:** Each item you clicked the checkbox on the previous screen is listed here.
3. **Enter Number of Files:** This field is not used for this process.
4. **Delivery Destination:** This is the person who is to receive these containers.  
**TEX SAYS** *If the person who is to receive the containers is someone other than the person listed here, turn to page 136, **Changing the Delivery Destination**.*
5. **Comments:** Enter information here to assist the State Records Center driver delivering your items.
6. **Alternate Fulfillment Method:** Used for rush delivery or Permanent Transfers.  
**TEX SAYS** *For more information about **Alternate Fulfillment Method**, turn to Page 137.*

## Request Delivery from SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, & Files\*

### Changing the Delivery Destination

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search

In the above illustration, Johnny Agency is the delivery destination (1). Sometimes a person other than yourself is the delivery destination. To make this adjustment, click **Search** (2) and continue below to search for the person who is the delivery destination.

**TEX SAYS** *If this dialogue box appears below the **Alternate Fulfillment Method** field:*

#### Recent Request Destinations

Item Description	Item Barcode	Item Type
Select Jane Division	0000774386	

click **Select** if the person listed is the delivery destination and continue to **Comments** field, Page 137.

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search

Individuals

Individual Quick Description	User ID	First Name	Last Name	Role	Individuals Barcode
Search Clear (Rollover for Current Search)					
Page 1 of 1 Jump to Page: <input type="text"/> Go The search found 0 Individuals					
User ID	First Name	Last Name	Job Title	Role	Individuals Barcode

When you clicked Search from the previous illustration, a Search portal appears. To search for the individual at your agency who is the delivery destination, enter information for that person in any of the **Quick Search** fields (1) and click **Search** (2).

**Data Example:** Jane (in First Name) Division (in Last Name)

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search

Individuals

Individual Quick Description	User ID	First Name	Last Name	Role	Individuals Barcode
Search Clear (Rollover for Current Search)		Jane	Division		
Page 1 of 1 Jump to Page: <input type="text"/> Go The search found 1 Individual					
User ID	First Name	Last Name	Job Title	Role	Individuals Barcode
<input type="radio"/> JaneDivision	Jane	Division	Admin. Staff	Records Center User	0000774386

When a list of names appears, click the button to the left of the person who is to be assigned as the Delivery Destination for this delivery request.

**TEX SAYS** *If you do not see the person you want to assign as the delivery destination, contact your agency's Records Management Officer.*

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Jane Division

0000774386

Search

When Johnny Agency selected Jane Division as the Delivery Destination, her name replaced his name as the delivery location.

## Request Delivery from SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, & Files\*

### Comments field

Comments:

Use the **Comments** field to provide information that will assist the delivery driver from the State Records Center.

**Data Example:** Jane's office#1289; phone#512-555-5000 but Charlie can sign for the delivery

### Alternate Fulfillment Method

Alternate Fulfillment Method:

Rush
Permanent Withdrawal

There are two options here:

- **Rush:** If this is a rush delivery, select this option. *This incurs an additional fee. See [Tex Says below for additional instruction](#).*
- **Permanent Withdrawal:** Select this if the item(s) (boxes, microfilm reels, complete microfiche bundles, or disaster recovery items) are never to be returned to the State Records Center. *This incurs an additional fee unless this is for files or Disaster Recovery boxes.*

For more information on Alternate Fulfillment Method, please see **Appendix: Alternate Fulfillment Method**.

**TEX SAYS** (1) *Leave this field empty if this is a standard delivery.* (2) *When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so the State Records Center is aware of this RUSH delivery.*

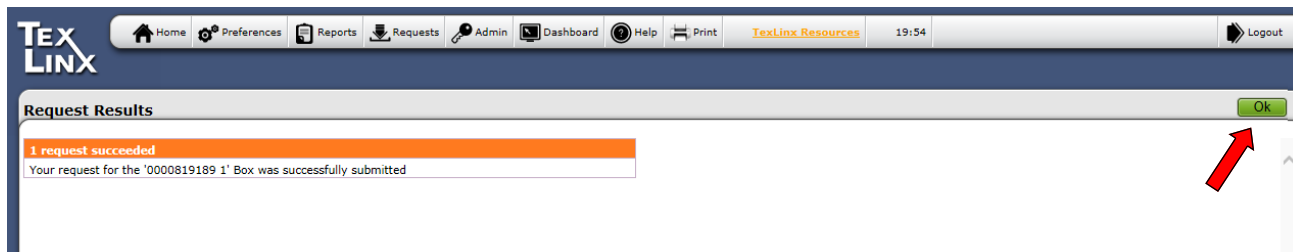
### Review the Request Items screen

The screenshot shows the 'Request Items' screen in the TEX LINX system. At the top is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TextLink Resources. The main content area is titled 'Request Items' and includes a 'Request' button (highlighted with a red arrow and callout 4) and a 'Cancel' button. Below the title, there is a message: 'Clicking the Request button will submit a request for the following items to be delivered to the 'Jane Division' Individual.' A table shows one item with 'Record Description' and '0000819189 1'. Below the table, there is a 'Remove' link and an 'Enter File Info' button. A section titled 'Items will be requested to this location:' contains a text input field with 'Jane Division' and '0000774386' (callout 1), a 'Search' button, and a user icon. At the bottom, there is a 'Comments:' field with the text 'Jane's office#1289; phone#512-555-5000 but Charlie can sign for the delivery' (callout 2) and an 'Alternate Fulfillment Method:' dropdown menu (callout 3).

Johnny Agency assigned Jane Division (1) as the delivery destination for this box. He also included her office location and her office phone number and an additional person who can sign for the delivery in the **Comments** field (2). He did not need to make this a Rush or a Permanent Withdrawal (3).

Once the screen is complete, click **Request** (4).

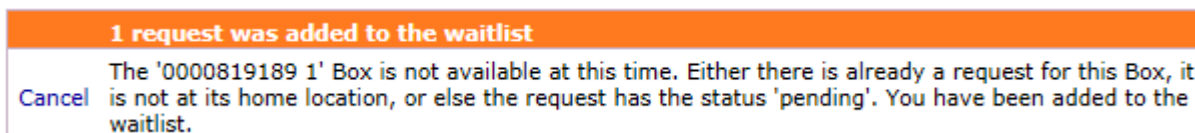
## Request Results screen



This tells you the Request Delivery was successfully submitted. The person assigned as the delivery destination will receive these items usually within one Monday-Friday workday for a regular (non-Rush) delivery.

Click **OK** to return to the homepage grid of the item type tab from where this request was generated.

If someone else had already requested delivery for this item, you would see the below message instead of the above successful message:



## Waitlist

If you want to receive the item after it is returned to the State Records Center, you do not need to do anything. The delivery will be processed when the item is returned to the SRC.

If you want to cancel this delivery request, turn to **Appendix: Cancel a Request (Pickup or Delivery)**.

**To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).**

**Request Delivery from SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, & Files\***

## NOTES

[illegible]

**Request Delivery from SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, & Files\***

## NOTES

[illegible]

# Request Delivery: from the State Records Center Files not already entered into TexLinx

If you searched for a file under the Files item type tab (or viewed the box and did not find the file) that you want delivered from a box that is at the State Records Center but the file does not exist in TexLinx, you need to create the file in TexLinx before you can request it. You can do this from the Boxes item type tab. **If the file already exists in TexLinx, do not continue in this section; see the section *Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files\**.**

## Find the Items to Request Delivery

To start the file request process in TexLinx, you must find the box by performing a search. There are two ways to do this::

- A. 1. Click the **Boxes** item type tab.
  2. Enter search terms into any of the **Quick Search** fields to find the box at the SRC.
  3. Click **Search** and continue to **Search Results** screen on Page 142.
- OR
- B. 4. Click **Search and View**.
  5. Select **Search** and continue below

## Search Boxes screen

Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the box where you want to create a file delivery request. Press **Execute**.

## Request Delivery from SRC: Files not Already Entered into TexLinX

### Search Results screen

Page 1 [2][3][4][5] | Jump to Page:  Go The search found 91 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input type="checkbox"/> 0000774345	Texas Big State Agency - 988 - North	RC	1	1/1/2003-12/31/2015	a z	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/> 0000774346	Texas Big State Agency - 988 - Central	RC	24	1/1/2003-12/31/2015	0001 0085	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/> 0000774348	Texas Big State Agency - 988 - East	RC	45	1/1/2003-12/31/2014	01 68	06/30/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency
<input type="checkbox"/> 0000774349	Texas Big State Agency - 988 - East	RC	a153	1/1/2002-12/31/2007	68a 99	12/31/2015	2	Client Questionnaire		8			Johnny Agency
<input type="checkbox"/> 0000774350	Texas Big State Agency - 988 - East	RP-36	60	1/1/2004-12/31/2005	ac001 zy026	08/31/2056	7	Employee Savings Bonds	FE	50			Johnny Agency
<input type="checkbox"/> 0000774351	Texas Big State Agency - 988 - East	RC	10	1/1/2009-12/31/2010	days months	12/31/2020	6	Employee Earnings Records	AC	10			Jane Division
<input type="checkbox"/> 0000774352	Texas Big State Agency - 988 - East	RC	77	1/1/2015-12/31/2015	Issue 2015-01.23   Issue 2015-01.29	12/31/2025	6	Employee Earnings Records	AC	10			Johnny Agency

Regardless of the Search method used from the previous page, the above illustration is your next screen.

Click the checkbox (1) for the box where you know the file is located at the State Records Center. You can see from the **Current Location** column (2) which boxes are at the SRC, they have ⚠️ in the Current Location column (3).

### Request Delivery

Page 1 [2][3][4][5] | Jump to Page:  Go The search found 91 Boxes

Box Barcode	Organization Quick Description	Box Size	Agency Box #	Inclusive Date Range	Beginning File   Ending File Range	Eligible Destruction Date	AIN	Record Series Title	Event Based	Years	Months	Destruction Batch #	Current Location
<input type="checkbox"/> 0000774345	Texas Big State Agency - 988 - North	RC	1	1/1/2003-12/31/2015	a z	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/> 0000774346	Texas Big State Agency - 988 - Central	RC	24	1/1/2003-12/31/2015	0001 0085	12/31/2017	17	Requests for Printing/Distribution		2			Johnny Agency
<input type="checkbox"/> 0000774348	Texas Big State Agency - 988 - East	RC	45	1/1/2003-12/31/2014	01 68	06/30/2020	1	Authorization to Participate Cards	AC	5	6		Johnny Agency
<input type="checkbox"/> 0000774349	Texas Big State Agency - 988 - East	RC	a153	1/1/2002-12/31/2007	68a 99	12/31/2015	2	Client Questionnaire		8			Johnny Agency
<input checked="" type="checkbox"/> 0000774350	Texas Big State Agency - 988 - East	RP-36	60	1/1/2004-12/31/2005	ac001 zy026	08/31/2056	7	Employee Savings Bonds	FE	50			Johnny Agency
<input type="checkbox"/> 0000774351	Texas Big State Agency - 988 - East	RC	10	1/1/2009-12/31/2010	days months	12/31/2020	6	Employee Earnings Records	AC	10			Jane Division
<input type="checkbox"/> 0000774352	Texas Big State Agency - 988 - East	RC	77	1/1/2015-12/31/2015	Issue 2015-01.23   Issue 2015-01.29	12/31/2025	6	Employee Earnings Records	AC	10			Johnny Agency

After you click the checkbox for the box where you know the file is located:

1. Click **Activity**.
2. Select **Request Delivery**.

**TEX SAYS** It might seem like you are requesting delivery for the box but this is part of the process for requesting a file that does not appear in TexLinX.

## Request Delivery from SRC: Files not Already Entered into TexLinx

### Request Items screen

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLinx Resources 19:38 Logout

**Request Items** Request Cancel

Clicking the Request button will move the following items to the 'Johnny Agency' Individual

Change This List Page 1 | Jump to Page: Go

Record Description
0000774350 60

Remove

Enter Number of Files Enter File Info

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination: Johnny Agency 0000774385 Search

Comments:

Alternate Fulfillment Method:

In the field to the right of **Enter Number of Files** (1), enter the number of files you want to request from this box. Then click **Enter File Info** (2).

**Data Example: 3**

### Enter File Information

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLinx Resources 19:56 Logout

**Request Items** Request Cancel

Clicking the Request button will move the following items to the 'Johnny Agency' Individual

Change This List Page 1 | Jump to Page: Go

Record Description
0000774350 60

Remove

Enter Number of Files 3 Enter File Info

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination: Johnny Agency 0000774385 Search

Comments:

Alternate Fulfillment Method:

**Recent Request Destinations**

Item Description	Item Barcode	Item Type
Select Jane Division	0000774386	
Select Johnny Agency	0000774385	

**Enter File Information**

Agency File Name	Agency Sub File Name	File Notes

After clicking **Enter File Info**, a table appears below the Alternate Fulfillment Method field (or below the Recent Request Destinations field, as it appears in this illustration). Depending upon the size of your screen you might have to scroll down the screen to see the **Enter File Information** table.

The number of rows available depends upon the value entered in the Enter Number of Files field near the top of the screen. If you find that more or fewer rows for this box are needed, repeat the steps at the top of this page. The table adds or removes the available rows.

**TEX SAYS** Changing the number of rows after you enter data in the table results in the data being cleared.

## Request Delivery from SRC: Files not Already Entered into TexLinx

### Enter File Information table

Enter File Information		
*Agency File Name	Agency Sub File Name	File Notes
①	②	③

There are three field columns on this table:

1. **Agency File Name** is a required field. This is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also explained in **Appendix: Definitions**).

*Data Example:* cj010

2. **Agency Sub File Name** is an optional field for additional information assigned to the file.

*Data Example:* Averages

3. **File Notes** is an optional field for information on this file.

*Data Example:* February

### Changing the Delivery Destination

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search

Move back up the page to review delivery information.

In the above illustration, Johnny Agency is the delivery destination (1). Sometimes a person other than yourself is the delivery destination. To make this adjustment, click **Search** (2) and continue below to search for the person who is the delivery destination.

**TEX SAYS** *If this dialogue box appears below the **Alternate Fulfillment Method** field:*

#### Recent Request Destinations

	Item Description	Item Barcode	Item Type
Select	Jane Division	0000774385	

click **Select** if this person is the delivery destination and continue with **Alternate Fulfillment Method** on Page 145.

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search

Individuals

Individual Quick Search

User ID

First Name

Last Name

Role

Individuals Barcode

Search

Clear

(Rollover for Current Search)

Page 1 of 1

Jump to Page:  Go

The search found 0 Individuals

Use **②**

First Name

Last Name

Job Title **①**

Role

Individuals Barcode

When you clicked Search from the previous illustration, a Search portal appears. To search for the individual at your agency who is the delivery destination, enter information for that person in any of the **Quick Search** fields (1) and click **Search** (2).

*Data Example:* Jane (in First Name) Division (in Last Name)

## Request Delivery from SRC: Files not Already Entered into TexLinX

### Changing the Delivery Destination (continued)

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search



Individuals

Individual Quick Description	User ID	First Name	Last Name	Role	Individuals Barcode
<input type="text"/>	<input type="text"/>	Jane	Division	<input type="text"/>	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/> (Rollover for Current Search)					

Page:  Jump to Page:  The search found 1 Individual

User ID	First Name	Last Name	Job Title	Role	Individuals Barcode
<input type="radio"/> JaneDivision	Jane	Division	Admin. Staff	Records Center User	0000774385

When a list of names appears, click the button to the left of the person who should be assigned as the delivery destination for this delivery request.

**TEX SAYS** *If you do not see the person you want to assign as the delivery destination, contact your agency's Records Management Officer.*

### Comments field

Comments:

Use the **Comments** field to provide information that will assist the delivery driver from the State Records Center.

**Data Example:** Ring bell on loading dock.

### Alternate Fulfillment Method

Alternate Fulfillment Method:

<input type="button" value="Rush"/>
<input type="button" value="Permanent Withdrawal"/>

There are two options here:

- **Rush:** If this is a rush delivery, select this option. *This incurs an additional fee. See **Tex Says** below for additional instruction.*
- **Permanent Withdrawal:** Select this if the item(s) are never to be returned to the State Records Center. *Files do not incur an additional fee for this option.*

For more information on Alternate Fulfillment Method, please see **Appendix: Alternate Fulfillment Method**.

**TEX SAYS** (1) *Leave this field empty if this is a standard delivery.* (2) *When selecting **RUSH** delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so the State Records Center is aware of this RUSH delivery.*

## Request Delivery from SRC: Files not Already Entered into TexLinx

### Submit the Delivery Request

**Request Items** Request Cancel

Clicking the Request button will submit a request for the following items to be delivered to the 'Jane Division' Individual.

[Change This List](#) Page 1 | Jump to Page:  Go

Record Description
Remove 0000774350 60

Enter Number of Files:  Enter File Info

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:  Search

Comments:

Alternate Fulfillment Method:

**Recent Request Destinations**

Item Description	Item Barcode	Item Type
<span>Select</span> Jane Division	0000774386	
<span>Select</span> Johnny Agency	0000774385	

**Enter File Information**

*Agency File Name	Agency Sub File Name	File Notes
cj010	Averages	February
cm005	Averages	February
jg024	Averages	February

Once the information appears as you want it to appear on the Request Items screen, click **Request**.

### Request Results

**Request Results** Ok

**3 requests succeeded**

- Your request for the 'cj010 0000819214' File was successfully submitted
- Your request for the 'cm005 0000819215' File was successfully submitted
- Your request for the 'jg024 0000819216' File was successfully submitted

This screen lists the items you have submitted for the delivery request. This process is complete. A file barcode label is generated at the State Records Center and affixed to the file so that if it is returned, it will be placed into the box from where it was pulled. Do not remove the file barcode label.

To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).

### Request Delivery from SRC: Files not Already Entered into TexLinx

## NOTES

[illegible]

### Request Delivery from SRC: Files not Already Entered into TexLinx

## NOTES

[illegible]

# Request Delivery: from the State Records Center: Microfiche Jackets

This section shows how to request delivery for microfiche jackets (also known as a microfiche partial bundle) using the Fiche Circulation tab by way of the Microforms tab. A microfiche partial bundle is any amount of microfiche jackets less than a microfiche complete bundle.

**TEX SAYS** To request delivery for microfiche complete bundles, see the section *Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files\**.

## Use Search

The screenshot shows the TEX LINX interface with the Microforms tab selected. Red arrows and numbers indicate the following steps:

- Click the Microforms item type tab.
- Enter search terms into any of the Quick Search fields to find the microfiche bundle.
- Click Search (continue to Search Results screen on Page 150).
- Click Search and View.
- Select Search (continue below).

The interface includes a top navigation bar with Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TexLinX Resources. Below this is a sub-navigation bar with Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main form contains fields for Microforms Barcode, Organization Quick Description, Agency Name, Division Name, Agency Reel #, Inclusive Date Range, Drive Date, Beginning File Range, Ending File Range, Create Date, Created By Description, and Last Modified Date. A Search button is located below the fields. A dropdown menu for Search and View is open, showing options: Search, Key Word Search, Query, View, and History.

1. Click the Microforms item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the microfiche bundle.
3. Click **Search** (continue to **Search Results** screen on Page 150).
- OR
4. Click **Search and View**.
5. Select **Search** (continue below).

## Search Microforms screen

The screenshot shows the Search Microforms screen. It includes a top navigation bar with Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TexLinX Resources. Below this is a sub-navigation bar with Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and TexLinX Resources. The main form contains fields for Organization, Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. A Search button is located below the fields. A dropdown menu for Search and View is open, showing options: Search, Key Word Search, Query, View, and History. An arrow points to the Execute button in the top right corner.

Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the microfiche bundle that the microfiche jackets are associated. Press **Execute**.

## Request Delivery from SRC: Microfiche Jackets

### Search Results screen

Microforms Barcode: 0000774384 or 77495 or  
Drive Date:   
Organization Quick Description:   
Agency Name:   
Division Name:   
Agency Reel #:   
Inclusive Date Range:   
Beginning File | Ending File Range:   
Create Date:   
Created By Description:   
Legacy Tracking #:   
Last Modified Date:   
Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart

The search found 4 Microforms

Microforms Barcode	Organization Quick Description	Record Series	Event Based	Years	Months	Agency Reel #	Inclusive Date Range	Film Type	Film Size	Beginning File   Ending File Range	Fiche Count	Current Location	Home Location
0000774384	Texas Big State Agency - 988 - Central	1 - Authorization to Participate Cards	AC	5	6	9	1/1/2003-12/31/2014	Microfiche	MICROFICHE	Administration participants   Administration participants	64	!	!
0000777495	Texas Big State Agency - 988 - Central	4 - Notice of Possible Eligibility		15		32.009	12/1/1980-11/30/1989	Microfiche	MICROFICHE	Client X7382   Client X7944	186	Johnny Agency	!
0000778177	Texas Big State Agency - 988 - East	27 - File Reports and Updates	AC	1	6	TR1	1/1/2013-12/31/2013	Microfiche	MICROFICHE	01/01/2013   12/31/2013	192	Johnny Agency	!
0000778178	Texas Big State Agency - 988 - East	27 - File Reports and Updates	AC	1	6	TR2	1/1/2014-12/31/2014	Microfiche	MICROFICHE	01/01/2014   12/31/2014	176	Johnny Agency	!

Regardless of the Search method you used from the previous page, the above illustration is the next screen. Since individual microfiche jackets are not identified on the Microforms tab, you should select the microfiche bundle where you know the microfiche jackets are located.

You are limited to work with one Microfiche Bundle at a time. If you need microfiche jackets for multiple microfiche bundles, create separate Fiche Circulations. Find the bundle that contains the microfiche jackets that you need to request delivery. Confirm the bundle is at the State Records Center (SRC). You can see ! in the Current Location column (1) for items at the SRC. Click the checkbox (2) for the microfiche bundle and continue below (or click the Microforms Barcode (3) to go directly to the View screen and turn to **View a Microform screen**, Page 151).

**TEX SAYS** The grid has as many container rows as your Preferences allow. If you need to see all of the containers you have searched but they are on multiple pages (4), increase/decrease the number of containers shown:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.

### Move to View a Microform screen

Microforms Barcode:   
Drive Date:   
Organization Quick Description:   
Agency Name:   
Division Name:   
Agency Reel #:   
Inclusive Date Range:   
Beginning File | Ending File Range:   
Create Date:   
Created By Description:   
Legacy Tracking #:   
Last Modified Date:   
Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart

The search found 4 Microforms

Microforms Barcode	Organization Quick Description	Record Series	Event Based	Years	Months	Agency Reel #	Inclusive Date Range	Film Type	Film Size	Beginning File   Ending File Range	Fiche Count	Current Location	Home Location
0000774384	Texas Big State Agency - 988 - Central	1 - Authorization to Participate Cards	AC	5	6	9	1/1/2003-12/31/2014	Microfiche	MICROFICHE	Administration participants   Administration participants	64	!	!
0000777495	Texas Big State Agency - 988 - Central	4 - Notice of Possible Eligibility		15		32.009	12/1/1980-11/30/1989	Microfiche	MICROFICHE	Client X7382   Client X7944	186	Johnny Agency	!
0000778177	Texas Big State Agency - 988 - East	27 - File Reports and Updates	AC	1	6	TR1	1/1/2013-12/31/2013	Microfiche	MICROFICHE	01/01/2013   12/31/2013	192	Johnny Agency	!
0000778178	Texas Big State Agency - 988 - East	27 - File Reports and Updates	AC	1	6	TR2	1/1/2014-12/31/2014	Microfiche	MICROFICHE	01/01/2014   12/31/2014	176	Johnny Agency	!

After clicking the checkbox for the microfiche bundle, click Search and View (4) and select View (5).

## Request Delivery from SRC: Microfiche Jackets

### View a Microform screen

**TEX LINX** Home Preferences Reports Requests Admin Dashboard Help Print [TexLinX Resources](#) 12:38 Logout

**View a Microform** Cancel

Activity Search and View Data Manipulation Data Removal Cart

**Organization Information :** Texas Big State Agency - 988 - Central  
 Agency Name: Texas Big State Agency - 988  
 Division Name: Central

**Imaging Production Information :**  
 Imaging Production #:   
 AIN:   
 Record Series Title:   
 Years:   
 Months:   
 Days:   
 Event Based:   
 Event Trigger:   
 Archival:   
 Confidentiality:   
 Vital:   
 Legal Citations:   
 What are you sending us to be imaged? (Media Type):

**Record Series Information :** 1 - Authorization to Participate Cards  
 AIN: 1  
 Record Series Title: Authorization to Participate Cards  
 Years: 5  
 Months: 6  
 Days:

(1) Scroll down the page to where you see 0000774384 9 contents: 0000774384 is the microform barcode, 9 is the microfiche bundle number.

Holds: ☒ Hold Type  
☐ Administrative  
☐ Audit  
☐ Fiscal  
☐ Legal  
☐ Public Information

Current Location:

Home Location:

Hub Location: SRC - 0000085998

0000774384 9 contents:  
 0 Fiche Circulation [Add New](#)

**Infolinx System Fields**

Deleted: ☐ **2**

Microforms Barcode: 0000774384  
 Microforms Quick Description: 0000774384 9  
 Create Date: 05/11/2015 01:52:17 PM

(2) Click **Add New**.

**TEX SAYS** If you see the below line of information in addition to **Add New**, disregard the additional information. Click **Add New**.

0000774369 a153 contents:  
 1 Fiche Circulation [Show Add New](#) [Run Contents Report](#) [Query Fiche Circulation at this location](#) [Query all Fiche Circulation with 0000774369 a153 as home location](#)

## Request Delivery from SRC: Microfiche Jackets

### Create a New Fiche Circulation screen

The newly created Fiche Circulation will be located in the 0000774384 9  
Fields marked with an \* are required.

1 → \*Organization: Texas Big State Agency - 988 - Central

2 → Microforms: 0000774384 9

3 →

Microforms Barcode	Organization Quick Description	Agency Name	Division Name	Agency Reel #	Inclusive Date Range
0000774384	Texas Big State Agency - 988 - Central	Texas Big State Agency - 988	Central	9	

\*# of Pulls:

# of Fiche Pulled:

Notes:

The top half of this screen is already completed because the information from the Microfiche Bundle populates the fields for Organization (1) and Microforms (2). The Barcode for the Microfiche Bundle (0000774384) and the Agency Reel # (9) appear in the Microforms field. The Record Series assigned to the Microfiche Bundle (3) appears below the Microforms information.

### \*# of Pulls

\*# of Pulls:

**# of Pulls** is a required field. It is a tool used in billing. Since this is a pull request from one Microfiche Bundle, you will always enter the number 1 into this field.

### # of Fiche Pulled

# of Fiche Pulled:

**# of Fiche Pulled** is how many Microfiche Jackets you are requesting from the Microfiche Bundle.

**TEX SAYS** *If you are unsure of the number of fiche, enter the number of items you list in the below Notes field.*

### Notes

Notes:

**Notes** is where you enter the title bar information for each Microfiche Jacket you request. The number of items listed here will match the number you entered into the above field **# of Fiche Pulled**.

## Request Delivery from SRC: Microfiche Jackets

### Completed: Create a New Fiche Circulation screen:

**TEX LINX** Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 4:31 Logout

**Create a new Fiche Circulation** Save & New Save & View Save & Close Set Defaults Cancel

The newly created Fiche Circulation will be located in the 0000774384 9  
Fields marked with an \* are required.

\*Organization: Texas Big State Agency - 988 - Central

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here:				

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. Search Clear

Page 1 | Jump to Page:  Go

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input checked="" type="radio"/> Texas Big State Agency - 988	Central			

Microforms: 0000774384 9 Add

Microforms Barcode	Organization Quick Description	Agency Name	Division Name	Agency Reel #	Inclusive Date Range
Search Here:					

Current Search: There is no current Microforms query. To search Microforms, enter your criteria and click the Search button.

Page 1 | Jump to Page:  Go

Microforms Barcode	Organization Quick Description	Agency Name	Division Name	Imaging Production #	Imaging Production #	Record Series	AIN	Record Series Title	Event Based	Years	Months	Event Trigger	Archival	Confidentiality
<input checked="" type="radio"/> 0000774384	Texas Big State Agency - 988 - Central	Texas Big State Agency - 988	Central			1 - Authorization to Participate Cards	1	Authorization to Participate Cards	AC	5	6		A	Confidential

\*# of Pulls:

# of Fiche Pulled:

Notes: Charles, Jamie  
Foster, Daniel  
Melton, Mick

### Saving

Save & New Save & View Save & Close

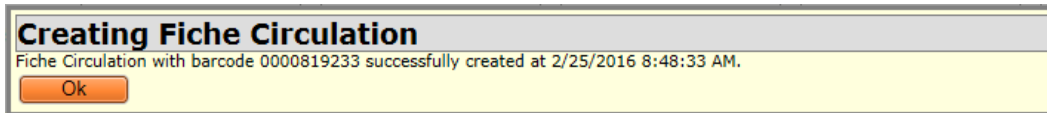
When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Fiche Circulation screen's top right:

- **Save & New:** Do not select this option because you will not create more than one Fiche Circulation per bundle.
- **Save & View:** Use this if you are ready to make a Request Delivery. On the View a Fiche Circulation screen, click **Activity** and select **Request Delivery** and turn to Page 157, **Request Items** screen.
- **Save & Close:** Use this if:
  - You want to save the information you have entered for the Fiche Circulation but you are not yet ready to make a Request Delivery for the Fiche Circulation.
  - or
  - You need to create another Fiche Circulation from another Microfiche Bundle.

## Request Delivery from SRC: Microfiche Jackets

### Creating Fiche Circulation dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New Fiche Circulation screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Fiche Circulation Barcode that was generated for this Fiche Circulation. The Fiche Circulation Barcode is the unique identification number applied to each item created in TexLink. Click **OK**. Then, if you selected:

- **Save & View:** The Fiche Circulation has been saved in TexLink. View a Fiche Circulation is the screen to review the Fiche Circulation you just created. Continue below to use Save & View to request delivery from the State Records Center.
- **Save & Close:** The Fiche Circulation has been saved in TexLink and the Microforms homepage appears. Continue to **Find the Items to Request Delivery** on the next page when you are ready to request delivery for this Fiche Circulation.

## REQUEST DELIVERY FOR MICROFICHE JACKETS

### Use Save & View to Request Delivery

From the **View a Fiche Circulation** screen, review to make sure the information is correct. If you need to make changes, click Data Manipulation and select Update then repeat the Save process. If everything is correct, click **Activity (1)** and select **Request Delivery (2)** and turn to **Request Items screen**, Page 157.

## Request Delivery from SRC: Microfiche Jackets

### Find the Items to Request Delivery

The screenshot shows the TEX LINX Records Series interface. Red arrows with numbers indicate the following steps:

- 1. Click the **Fiche Circulation** tab.
- 2. Enter search terms into the **Quick Search** fields.
- 3. Click the **Search** button.
- 4. Click the **Search and View** dropdown menu.
- 5. Select **Search** from the dropdown menu.

To find the Fiche Circulation that lists the Microfiche Jackets you need delivered from the State Records Center, there are two ways to perform a search:

- A. 1. Click the Fiche Circulation item type tab you want to search.
2. Enter search terms into any of the **Quick Search** fields to find the Fiche Circulation.
3. Click **Search** and continue to **Search Results Screen** on Page 156.

OR

- B. 4. Click **Search and View**.
5. Select **Search** and continue below.

### Search Fiche Circulation screen

The screenshot shows the Search Fiche Circulation screen. It includes the following sections:

- Organization:** Fields for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname.
- Microforms:** Fields for Microforms Barcode, Organization Quick Description, Agency Name, Division Name, Agency Reel #, Inclusive Date Range, Drive Date, Beginning File | Ending File Range, Create Date, Created By Description, Legacy Tracking #, and Last Modified Date.
- Current Search:** Search and Clear buttons.
- Search Here:** Search and Clear buttons.
- Additional Fields:** Inclusive Date Range, Film Type, Beginning File/Ending File, Fiche Count, Notes, Legacy Tracking #, and Legacy Notes.
- Summary Fields:** # of Pulls, # of Fiche Pulled, and Notes.

Enter search information into any fields (including the **Infomix System Fields** on the bottom half of the screen) to find the item(s) that you want to request delivery. Press **Execute**.

## Request Delivery from SRC: Microfiche Jackets

### Search Results screen

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 9:45 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production

Records Series

Fiche Circulation Barcode: 819233 Organization Quick Description: # of Pulls: # of Fiche Pulled: Notes:

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

Page 1 | Jump to Page: Go The search found 1 Fiche Circulation

Fiche Circulation Barcode	Organization Quick Description	# of Fiche Pulled	Notes	Current Location
819233	Texas Big State Agency - 988 - Central	3	Charles, Jamie Foster, Daniel Melton, Mick	Johnny Agency

Regardless of the Search method you used from the previous page, the above illustration is the next screen.

Click the checkbox(es) (1) for the Fiche Circulation item(s) you want to request delivery from the State Records Center. If there is more than one item and you want to select all of the items on this screen page, click the checkbox in the orange ribbon (2).

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 19:53 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production

Records Series

Fiche Circulation Barcode: 819233 Organization Quick Description: # of Pulls: # of Fiche Pulled: Notes:

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

The search found 1 Fiche Circulation

Organization Quick Description	# of Fiche Pulled	Notes	Current Location
Texas Big State Agency - 988 - Central	3	Charles, Jamie Foster, Daniel Melton, Mick	Johnny Agency

Request Delivery  
Request Pickup  
Transfer  
Export

After you select the Fiche Circulation item, click **Activity** (3) and select **Request Delivery** (4).

## Request Delivery from SRC: Microfiche Jackets

### Request Items screen

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 16:54 Logout

**Request Items** Request Cancel

Clicking the Request button ① move the following items to the 'Johnny Agency' Individual

Change This List Page 1 | Jump to Page: Go

Record Description
0000819233 - Texas Big State Agency - 988 - Central ②

Remove

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination: Johnny Agency ③ Search

Comments: ④

Alternate Fulfillment Method: ⑤

1. **Page Information:** Tell you how many request pages there are. There are 10 requests per request page. All requests will be submitted together.
2. **Record Description:** The Fiche Circulation you selected on the previous screen is listed here.
3. **Delivery Destination:** This is the person who receives these Microfiche Jackets.  
**TEX SAYS** *If the person who is to receive the Microfiche Jackets is someone other than the person listed here, see below, **Changing the Delivery Destination**.*
4. **Comments:** You may enter information here to assist the State Records Center driver who is delivering your items.
5. **Alternate Fulfillment Method:** Used for rush delivery or Permanent Transfers.  
**TEX SAYS** *For more information about **Alternate Fulfillment Method**, turn to Page 159.*

### Changing the Delivery Destination

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination: Johnny Agency ① ② Search

In the above illustration, Johnny Agency is the delivery destination (1). Sometimes a person other than yourself is to be the delivery destination. To make this adjustment, click **Search** (2) and continue on the next page to search for the person who is the delivery destination.

**TEX SAYS** *If this dialogue box appears below the **Alternate Fulfillment Method** field:*

Recent Request Destinations			
	Item Description	Item Barcode	Item Type
Select	Jane Division	0000774386	

click **Select** if the person listed is the delivery destination and continue to the third illustration on Page 158 to see the delivery location name has been changed.

## Request Delivery from SRC: Microfiche Jackets

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search



Individuals

Individual Quick Description	User ID	First Name	Last Name	Role	Individuals Barcode
Search Clear (Rollover for Current Search)					

Page 1 of 1 Jump to Page:  Go The search found 0 Individuals

User ID	First Name	Last Name	Job Title	Role	Individuals Barcode

When you clicked Search from the previous illustration, a Search portal appears. To search for the individual at your agency who is to be the delivery destination, enter information for that person in any of the **Quick Search** fields (1) and click **Search** (2).

**Data Example:** Jane (in First Name) Division (in Last Name)

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency

0000774385

Search



Individuals

Individual Quick Description	User ID	First Name	Last Name	Role	Individuals Barcode
Search Clear (Rollover for Current Search)		Jane	Division		

Page 1 of 1 Jump to Page:  Go The search found 1 Individual

User ID	First Name	Last Name	Job Title	Role	Individuals Barcode
JaneDivision	Jane	Division	Admin. Staff	Records Center User	0000774386

When a list of names appears, click the button to the left of the person who is to be assigned as the delivery destination for this delivery request.

**TEX SAYS** If you do not see the person you want to assign as the delivery destination, contact your agency's Records Management Officer.

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination:

Jane Division

0000774386

Search



When Johnny Agency selected Jane Division as the delivery destination, her name replaced his name as the delivery location.

## Comments field

Comments:

Use the **Comments** field to provide information that will assist the delivery driver from the State Records Center.

**Data Example:** Ring bell on loading dock.

## Request Delivery from SRC: Microfiche Jackets

### Alternate Fulfillment Method

Alternate Fulfillment Method:

Rush  
Permanent Withdrawal

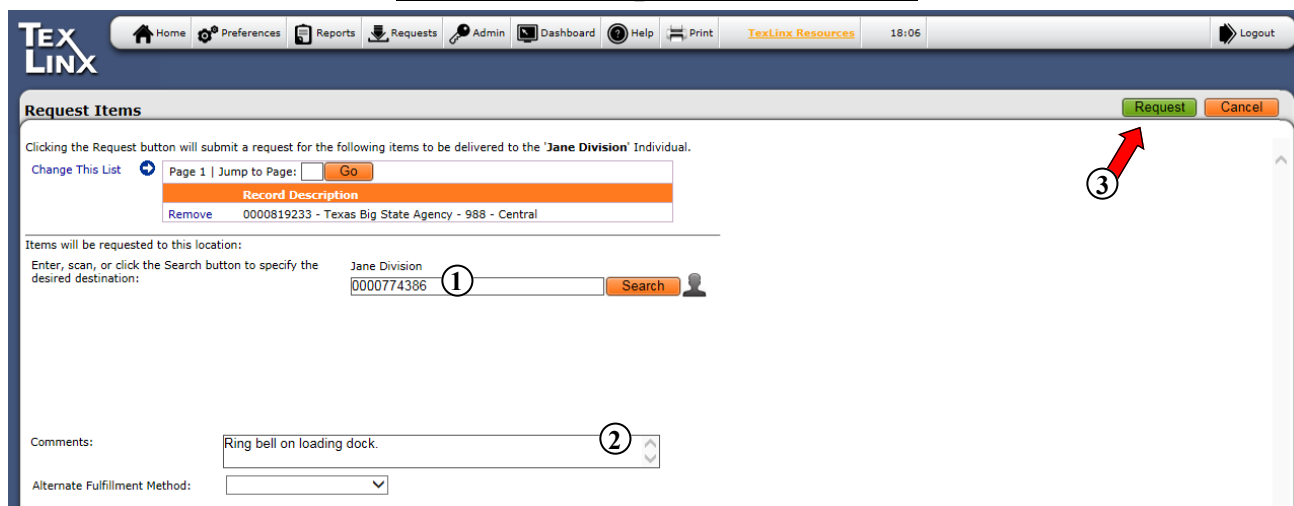
There are two options here:

- **Rush:** If this is a rush delivery, select this option. *This incurs an additional fee. See **Tex Says** below for additional instruction.*
- **Permanent Withdrawal:** Select this if the item(s) are never to be returned to the State Records Center. *This does not incur an additional fee for individual microfiche jackets, only when the request is for a permanent withdrawal of complete microfiche bundles.*

For more information on Alternate Fulfillment Method, please see **Appendix: Alternate Fulfillment Method**.

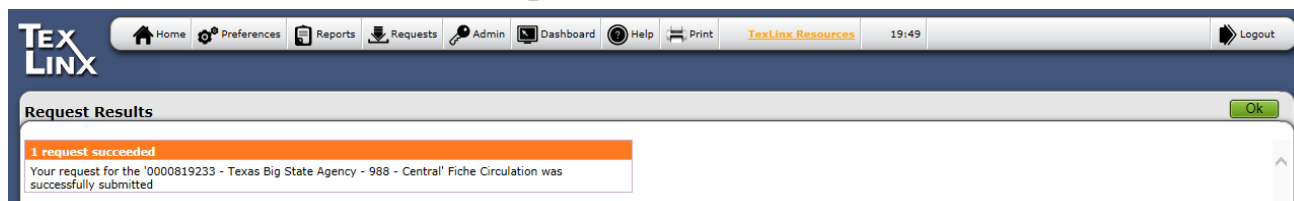
**TEX SAYS** (1) Leave this field empty if this is a standard delivery. (2) When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so the State Records Center is aware of this RUSH delivery.

### Review the Request Items screen



Johnny Agency assigned Jane Division (1) as the delivery destination for the microfiche jackets. In the **Comments** field (2), he had a special request for the SRC delivery driver. Once the screen is complete, click **Request** (3).

### Request Results screen



This tells you the Request Delivery was successfully submitted. The person assigned as the delivery destination will receive these items. Click **OK** to return to the microforms homepage grid.

To cancel any Request, please see **Appendix: Cancel a Request (Pickup or Delivery)**.

### Request Delivery from SRC: Microfiche Jackets

## NOTES

[illegible]

# Imaging Production

## Create a work order for the State Records Center's Imaging Department

The **Imaging Production** item type tab is where you complete fields to create instructions to tell the State Records Center's Imaging Department what you want done for a finished product. This item type tab has replaced the RMD101 paper form.

The screenshot shows the TEX LINX web application interface. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TextLink Resources, and a clock showing 19:55. Below this is a secondary navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production (highlighted), and Records Series. The main content area contains a form for creating an imaging production. The form has two rows of input fields. The first row includes: Imaging Production #, Organization Quick Description, Agency Name, Division Name, Contact Name, and Contact Phone # (and extension). The second row includes: What are you sending us to be imaged? (Media Type), What media are we creating?, What size media are we creating?, Duplicate, Type of Duplicate, and Addition. Below the form are buttons for Search, Clear, and a rollover for current search. At the bottom, there is an Action Menu with tabs: Activity, Search and View, Data Manipulation (selected), Data Removal, and Cart. The Data Manipulation dropdown menu is open, showing options: Create, Update, Bulk Update, and Search & Replace. A table header is visible at the bottom of the screen, with columns: Imaging Production #, Organization Quick Description, What are you sending us to be imaged? (Media Type), What media are we creating?, What size media are we creating?, Type of Duplicate, Hub Addition Location, Current Location, and Home Location.

1. Click the **Imaging Production** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Create** from the dropdown menu.

## Imaging Production: Create a Work Order for the SRC's Imaging Department

**TEX SAYS** All fields with an asterisk (\*) are required fields. The page does not process without completing these required fields.

### Create a new Imaging Production screen

TEX  
LINX

[Home](#) [Preferences](#) [Reports](#) [Requests](#) [Admin](#) [Dashboard](#) [Help](#) [Print](#) [TextLink Resources](#) 19:52 [Logout](#)

Create a new Imaging Production [Save & New](#) [Save & View](#) [Save & Close](#) [Set Defaults](#) [Cancel](#)

Fields marked with an \* are required.

\*Imaging Production #: 0000819218

\*Organization:

Agency NameDivision NameBusiness Unit NameBusiness Sub-Unit NameOrganization Nickname

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. [Search](#) [Clear](#)

Page 1 | Jump to Page:  [Go](#)

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
<input type="radio"/> Texas Big State Agency - 988				Texas Big State Agency
<input type="radio"/> Texas Big State Agency - 988	Central			
<input type="radio"/> Texas Big State Agency - 988	East			
<input type="radio"/> Texas Big State Agency - 988	West			
<input type="radio"/> Texas Big State Agency - 988	North			
<input type="radio"/> Texas Big State Agency - 988	South			

Contact Name:

Contact Phone # (and extension):

Will Created Media be stored at SRC?: ☐

Will Source Media be stored at SRC?: ☐

Record Series:

Organization Quick DescriptionAINRSINRecord Series TitleEvent BasedYears

Search Here:

MonthsDaysEvent TriggerArchivalVitalRemarks

Legal CitationsApproval Status

Current Search: There is no current Record Series query. To search Record Series, enter your criteria and click the Search button. [Search](#) [Clear](#)

\*# of Items being Sent:

\*What are you sending to be imaged? (Media Type):

Is your Source Media already stored at SRC?: ☐

If Source Media is stored here, how many are we imaging?:

Agency Reel #/Box # Range and/or Barcodes:

\*Inclusive Date Range:

\*What media are we creating?:

\*What size media are we creating?:

Beginning File | Ending File Range:

Process Only?: ☐

Duplicate:

Addition:

Document Preparation:

# of Reels Returned to Customer:

Notes:

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## Imaging Production: Create a Work Order for the SRC's Imaging Department

### \*Imaging Production #

\*Imaging Production #: 0000819218

The **Imaging Production #** is an auto-generated barcode created by TexLinX that is assigned to your Imaging Production request. You cannot edit this field.

### \*Organization

\*Organization:

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input type="text"/> Go				
<input type="radio"/>	Texas Big State Agency - 988			Texas Big State Agency
<input type="radio"/>	Texas Big State Agency - 988	Central		
<input type="radio"/>	Texas Big State Agency - 988	East		
<input type="radio"/>	Texas Big State Agency - 988	West		

Select the **Organization** within the agency associated with this Imaging Production by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** *If you do not see the organization you need, the organization does not exist in TexLinX or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.*

### Contact Name

Contact Name:

**Contact Name** is the person the State Records Center's Imaging Department contacts concerning this Imaging Production.

**Data Example:** Johnny Agency

### Contact Phone # (and extension)

Contact Phone # (and extension):

**Contact Phone #** is the phone number for the person listed as the Contact Name.

**Data Example:** 512-555-5002 x75

### How these fields look when completed:

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:11 Logout

Create a new Imaging Production [Save & New] [Save & View] [Save & Close] [Set Defaults] [Cancel]

Fields marked with an \* are required.

\*Imaging Production #: 0000819218

\*Organization: Texas Big State Agency - 988 - Central

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Nickname
Search Here: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Page 1   Jump to Page: <input type="text"/> Go				
<input type="radio"/>	Texas Big State Agency - 988			Texas Big State Agency
<input checked="" type="radio"/>	Texas Big State Agency - 988	Central		
<input type="radio"/>	Texas Big State Agency - 988	East		
<input type="radio"/>	Texas Big State Agency - 988	West		

Contact Name: Johnny Agency

Contact Phone # (and extension): 512-555-5002 x75

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Will Created Media be Stored at SRC?

Will Created Media be stored at SRC?: ☐

Click this checkbox if the product the State Records Center's Imaging Department is creating for you is to be stored at the State Records Center and complete the appropriate tab for storage.

**TEX SAYS** If you click this checkbox, the Record Series field below becomes a required field.

### Will Source Media be Stored at SRC?

Will Source Media be stored at SRC?: ☐

Source Media is what you are providing as the material for this Imaging Production. Click this checkbox if the items the State Records Center's Imaging Department is using to create an imaging product for you is to be stored at the State Records Center.

### Record Series

\*Record Series:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="employee"/>	<input type="text"/>	<input type="text"/>
Search Here: <input type="text"/>	Months <input type="text"/>	Days <input type="text"/>	Event Trigger <input type="text"/>	Archival <input type="text"/>	Vital <input type="text"/>
Legal Citations <input type="text"/>	Approval Status <input type="text"/>				

Current Search: Find all Record Series where Record Series Title Contains 'employee'.

Page 1 | Jump to Page:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	6		Employee Earnings Records	AC	10				R	False	15-988-006		Approved
<input type="radio"/> Texas Big State Agency - 988	7		Employee Savings Bonds	FE	50				R	False	15-988-007		Approved
<input type="radio"/> Texas Big State Agency - 988	8		Employee Deduction Authorizations	FE	50				R	False	15-988-008		Approved
<input type="radio"/> Texas Big State Agency - 988	22		Employee Surveys	US	10					True	15-988-022		Approved

**Record Series** is a required field only if the product the State Records Center's Imaging Department is creating will be stored at the State Records Center (SRC) and/or if the Source Media you provide will be stored at the SRC. The Record Series Title on the agency's Records Retention Schedule is what the imaging media is to be assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears.

Use **Quick Search** fields (1) to narrow the selection of Record Series Titles and press **Search** (2).

**TEX SAYS** If the Record Series you need is not listed, contact your agency's Records Management Officer to resolve this issue.

### How these fields look when completed:

Will Created Media be stored at SRC?: ☒

Will Source Media be stored at SRC?: ☒

\*Record Series:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="employee"/>	<input type="text"/>	<input type="text"/>
Search Here: <input type="text"/>	Months <input type="text"/>	Days <input type="text"/>	Event Trigger <input type="text"/>	Archival <input type="text"/>	Vital <input type="text"/>
Legal Citations <input type="text"/>	Approval Status <input type="text"/>				

Current Search: Find all Record Series where Record Series Title Contains 'employee'.

Page 1 | Jump to Page:

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
<input type="radio"/> Texas Big State Agency - 988	6		Employee Earnings Records	AC	10				R	False	15-988-006		Approved
<input type="radio"/> Texas Big State Agency - 988	7		Employee Savings Bonds	FE	50				R	False	15-988-007		Approved
<input type="radio"/> Texas Big State Agency - 988	8		Employee Deduction Authorizations	FE	50				R	False	15-988-008		Approved
<input checked="" type="radio"/> Texas Big State Agency - 988	22		Employee Surveys	US	10					True	15-988-022		Approved

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### # of Items being sent

\*# of Items being Sent:

**# of Items being sent** is a required field. This is the total number of containers for the source documents that you are providing to the State Records Center's Imaging Department to create your product.

### \*What are you sending us to be imaged (Media Type)

\*What are you sending us to be imaged? (Media Type):

Diazo 16mm - 2.5mil
Diazo 16mm - 5mil
Diazo 35mm - 5mil
Electronic
Hard Copy
Microfiche (Duplicate)
Microfiche (Original)
Silver 16mm - 2.5mil
Silver 16mm - 5mil
Silver 35mm - Direct
Silver 35mm - Print

**What are you sending us to be imaged (Media Type)** is a required field. This is the medium type of the source documents you are providing.

**TEX SAYS** *With the exception of Diazo, all media types are eligible for storage at the State Records Center:*

- **Diazo 16mm-2.5mil:** Diazo is a less durable microfilm used for non-archival and non-permanent information in 16 millimeter, 2.5mil.
- **Diazo 16mm-5mil:** Diazo is a less durable microfilm used for non-archival and non-permanent information in 16 millimeter, 5mil.
- **Diazo 35mm-5mil:** Diazo is a less durable microfilm used for non-archival and non-permanent information in 35 millimeter, 5mil.
- **Electronic:** Compact Disc, Portable Hard Drive, Flash Drive, or other USB Drive.
- **Hard Copy:** Paper documents (loose or bound).
- **Microfiche (Duplicate):** Microfilm cut and inserted into microfiche jackets, duplicate version.
- **Microfiche (Original):** Microfilm cut and inserted into microfiche jackets, duplicate version.
- **Silver 16mm-2.5mil:** More durable microfilm used for archival and permanent information in 16 millimeter, 2.5 mil.
- **Silver 16mm-5mil:** More durable microfilm used for archival and permanent information in 16 millimeter, 5mil.
- **Silver 35mm-Direct:** More durable microfilm used for archival and permanent information in 35 millimeter filmed as an identical image.
- **Silver 35mm-Print:** More durable microfilm used for archival and permanent information in 35 millimeter filmed as a negative or opposite-appearing image.

**TEX SAYS** *1 mil = 0.001 of an inch.*

### How these fields look when completed:

\*# of Items being Sent:

\*What are you sending us to be imaged? (Media Type):

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Is your Source Media already stored at SRC?

Is your Source Media already  
stored at SRC?: ☐

If the Source Media you are providing to the State Records Center's Imaging Department to create your product is already in storage at the State Records Center, click this checkbox.

### If Source Media is stored here, how many are we imaging?

If Source Media is stored here,  
how many are we imaging?:

How many containers in storage at the State Records Center is the State Records Center's Imaging Department using to create the product you are requesting?

**Data Example:** 3

### Agency Reel # / Box # Range and/or Barcodes

Agency Reel #/Box # Range  
and/or Barcodes:

The Source Documents' beginning and ending container numbers or the first and last barcodes.

**Data Example:** 10 thru 12

### Inclusive Date Range

\*Inclusive Date Range:

- The **Inclusive Date Range** is the earliest date and the latest date for the Source Documents. The date information is entered in this format using forward slashes within the dates, with no spaces, and a hyphen to separate the dates:

MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice. Example: 12/31/2015-12/31/2015.

**TEX SAYS** Do not use a hyphen within the dates, use a hyphen only to separate the dates.

**Data Example:** 07/01/2010-12/31/2014 or 7/1/2010-12/31/2014 or 7/1/10-12/31/14

### How these fields look when completed:

Is your Source Media already  
stored at SRC?: ☐

If Source Media is stored here,  
how many are we imaging?:

Agency Reel #/Box # Range  
and/or Barcodes:

\*Inclusive Date Range:

### What media are we creating?

\*What media are we creating?:

CD
Diazo
DVD
FTP Link
Microfiche Jackets
Original
Other (Add to notes field)
Silver
USB/Flash Drive

What you select here tells the State Records Center's Imaging Department the medium type you want the finished product to be.

**TEX SAYS** *With the exception of Diazo, all media types are eligible to be stored at the State Records Center:*

- **CD:** Data saved to a compact disc.
- **Diazo:** Less durable microfilm used for non-archival and non-permanent information.
- **DVD:** Data saved to a digital video disc.
- **FTP Link:** Data saved to an FTP upload website.
- **Microfiche Jackets:** 16mm or 35mm microfilm cut and inserted into microfiche jackets.
- **Original:** The first generation of a reel of microfilm.
- **Other (Add to notes field):** Explain in the notes field at the bottom of the screen.
- **Silver:** More durable microfilm used for archival and permanent information.
- **USB/Flash Drive:** Data saved to a thumb drive or any portable storage device.

## What size media are we creating?

\*What size media are we creating?:

CD
Diazo - Microfiche
Diazo 16mm - 2.5mil
Diazo 16mm - 5mil
Diazo 35mm - 5mil
DVD
FTP Link
Other (Add to notes field)
Silver - Microfiche
Silver 16mm - 2.5mil
Silver 16mm - 5mil
Silver 35mm - Direct
Silver 35mm - Print
USB/Flash Drive

What you select here tells the State Records Center's Imaging Department the size of the medium you want the finished product to be.

**TEX SAYS** *With the exception of Diazo, all media types are eligible to be stored at the State Records Center:*

- **CD:** If selected medium above is CD.
- **Diazo-Microfiche:** If selected medium is Diazo, this is for microfiche.
- **Diazo 16mm-2.5mil:** If selected medium is Diazo, this is for 16mm-2.5mil microfilm.
- **Diazo 16mm-5mil:** If selected medium is Diazo, this is for 16mm-5mil microfilm.
- **Diazo 35mm-5 mil:** If selected medium is Diazo, this is for 35mm-5mil microfilm.
- **DVD:** If selected medium is DVD.
- **FTP Link:** If selected medium is FTP Link.
- **Other (Add to notes field):** Explain in notes field at the bottom of the screen.
- **Silver-Microfiche:** If selected medium is Silver, this is for microfiche.
- **Silver 16mm-2.5mil:** If selected medium is Silver, this is for 16mm-2.5mil microfilm.
- **Silver 16mm-5mil:** If selected medium is Silver, this is for 16mm-5mil microfilm.
- **Silver 35mm-Direct:** If selected medium is Silver, this is for 35mm Direct filmed as an identical image.
- **Silver 35mm-Print:** If selected medium is Silver, this is for 35mm Print filmed as a negative or opposite-appearing image.
- **USB/Flash Drive:** If selected medium is USB/Flash Drive.

## Beginning File | Ending File Range

Beginning File | Ending File Range:

The **Beginning File | Ending File Range** is composed of the first and last item in the box. The Pipe symbol is used as a separator between the beginning file name and the ending file name. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** *If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.*

*In the below example, a space appears before and after the Pipe for illustrative purposes only.*

**Data Example:** July thru December 2010 surveys | July thru December 2014 surveys

### How these fields look when completed:

\*What media are we creating?:

\*What size media are we creating?:

Beginning File/Ending File Range:

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Process Only?

Process Only?: ☐

Click this checkbox if you are asking the State Records Center's Imaging Department to **Process Only** and return to you a microfilm reel and it is not to be stored at the State Records Center.

### Duplicate

Duplicate: 

No
Yes

If you select **No**, move on to the next field on the form (**Addition**).

If you select **Yes**, these additional fields appear:

# of Duplicates:

**# of Duplicates:** How many duplicates are you wanting the State Records Center's Imaging Department to create as the final product?

Type of Duplicate: 

Diazo 16mm - 2.5mil
Diazo 16mm - 5mil
Diazo 35mm - 2.5mil
Diazo 35mm - 5mil
Microfiche
Silver 16mm - 2.5mil
Silver 16mm - 5mil
Silver 35mm - Direct
Silver 35mm - Print

**Type of Duplicate:** What kind of duplicate are you asking the State Records Center's Imaging Department to create as the final product?

**TEX SAYS** Use the *Notes* field to list the barcodes if they are in storage at the State Records Center.

### Addition

Addition: 

No
Yes

**Addition:** If this is for an addition to an existing medium, select **Yes**. If this is not for an addition, select **No**. Use the **Notes** field to explain if you select **Yes**.

**TEX SAYS** This is used only when you want the SRC Imaging Department to add images to an already created reel of microfilm. Items are not added to microfiche jackets.

### Document Preparation

Document Preparation:

**Document Preparation:** Enter information here if the Source Documents you are providing require any preparation by the State Records Center's Imaging Department:

- Removing staples, paper clips, binder clips and other fastening materials.
- Separating documents from folders, binders, books, or notebooks.
- Trimming glue or other adhesives from documents.

**Data Example:** Staple removal and paper clip removal

### How these fields look when completed:

Process Only?: ☐

Duplicate: 

No	▼
----	---

Addition: 

No	▼
----	---

Document Preparation:

**Imaging Production: Create a Work Order for the SRC's Imaging Department**

**# of Reels Returned to Customer**

# of Reels Returned to  
Customer:

This field is completed by the State Records Center's Imaging Department. **Do not enter information into this field.**

**Notes**

Notes:

**Notes** is a catch-all field designed to give you the opportunity to include anything that you think might not be included in the fields on this screen. This is also where you explain any **Addition** information.

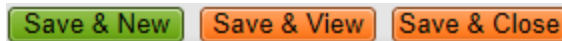
**Data Example:** Box Numbers are 10, 11, and 12  
Paper is legal size

### **Completed: Create a New Imaging Production:**

171

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Saving

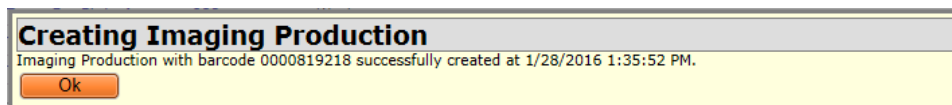


When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Image Production screen's top right:

- **Save & New:** Use this to create another Imaging Production.
- **Save & View:** Use this if you have entered only one Imaging Production and you are ready to make a Request Pickup.
- **Save & Close:** Use this if:
  - You have been selecting Save & New for a set of Imaging Productions and you are ready to create a Request Pickup.or
  - You want to save the information you have entered for the Imaging Production(s) but you are not yet ready to create a Request Pickup.

### Creating Imaging Production dialogue box



If the above dialogue box does not appear, and you are returned to the Create a New Imaging Production screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Imaging Production Barcode that was generated for this Imaging Production. The Imaging Production Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New:** Another Create a New Imaging Production screen appears. Some fields carried forward from the previous box created but all fields are editable.
- **Save & View:** View an Imaging Production is the screen for you to review the Imaging Production you just created and is saved in TexLinx. Continue to the last item on Page 174 (**View an Imaging Production**) to create the request for the State Records Center to pickup the Imaging Production if you are ready to initiate the request.
- **Save & Close:** The Imaging Production has been saved in TexLinx and the Imaging Production homepage appears. Save & Close is used when you are not yet ready to create a request for the State Records Center to process the Imaging Production request. When you are ready to initiate the request, continue to the next page to find the Imaging Production in TexLinx that begins the process to create a request for the State Records Center.

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Use Search to find your Imaging Production

The screenshot shows the TEX LINX interface with the 'Imaging Production' tab selected. The form includes fields for Imaging Production #, Organization Quick Description, Agency Name, Division Name, Contact Name, and Contact Phone #. There are also fields for 'What are you sending us to be imaged? (Media Type)', 'What media are we creating?', and 'What size media are we creating?'. A 'Search' button is located at the bottom left of the form. Below the form, there is a navigation bar with 'Activity', 'Search and View', 'Data Manipulation', 'Data Removal', and 'Cart' buttons. The 'Activity' dropdown menu is open, showing options like 'Search', 'Key Word Search', 'Query', 'View', and 'History'. A red arrow points to the 'Search' option in the dropdown.

1. Click the item type tab for Imaging Production.
2. Enter search terms into any of the **Quick Search** fields to find the box or boxes.
3. Click **Search** (continue to **Imaging Production Search Results**, Page 174).  
OR
4. Click **Search and View**.
5. Select **Search** (continue below).

### Search Imaging Production screen

The screenshot shows the 'Search Imaging Production' screen. It includes fields for Organization, Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. There are also fields for Contact Name and Contact Phone #. Below these are dropdown menus for 'Will Created Media be stored at SRC?' and 'Will Source Media be stored at SRC?'. At the bottom, there is a 'Record Series' section with fields for Organization Quick Description, AIN, RSIN, Record Series Title, Event Based, and Years. There are also fields for 'Search Here' and 'Current Search'. A red arrow points to the 'Execute' button at the top right of the screen.

Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the Imaging Production that you want to create a request. Press **Execute**.

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Imaging Production Search Results

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:37 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production Records Series

Imaging Production # 819218

Organization Quick Description

Agency Name

Division Name

Contact Name

Contact Phone # (and extension)

What are you sending us to be imaged? (Media Type)

What media are we creating?

What size media are we creating?

Duplicate

Type of Duplicate

Addition

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

Page 1 | Jump to Page: Go The search found 1 Imaging Production

Imaging Production #	Organization Quick Description	Contact Name	Contact Phone # (and extension)	What are you sending us to be imaged? (Media Type)	What media are we creating?	What size media are we creating?	Type of Duplicate	Addition	Hub Location	Current Location	Home Location
<input checked="" type="checkbox"/> 000819218	Texas Big State Agency - 988 - Central	Johnny Agency	512-555-5002 x75	Hard Copy	Original	Silver 16mm - 5mil				Johnny Agency	Imaging Production - 0000777351

Regardless of the search method used on the previous page, this is the next screen you see. Click the checkbox for the Imaging Production request you want to send to the State Records Center's Imaging Department.

### Initiate the Imaging Production Request

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 18:23 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production Records Series

Imaging Production # 819218

Organization Quick Description

Agency Name

Division Name

Contact Name

Contact Phone # (and extension)

What are you sending us to be imaged? (Media Type)

What media are we creating?

What size media are we creating?

Duplicate

Type of Duplicate

Addition

Search Clear (Rollover for Current Search)

Activity Search and View Data Manipulation Data Removal Cart (0 items)

Request Delivery

Request Pickup

Export

Imaging Production # 000819218

Organization Quick Description Texas Big State Agency - 988 - Central

Contact Name Johnny Agency

Contact Phone # (and extension) 512-555-5002 x75

What are you sending us to be imaged? (Media Type) Hard Copy

What media are we creating? Original

What size media are we creating? Silver 16mm - 5mil

Type of Duplicate

Addition

Hub Location

Current Location Johnny Agency

Home Location Imaging Production - 0000777351

After clicking the checkbox for the Imaging Production:

1. Click **Activity**.
2. Select **Request Pickup** and go to **Request Items to be Picked Up** screen on the next page.

### View an Imaging Production screen (if you selected Save & View from page 172)

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:55 Logout

Boxes Files Disaster Recovery Microforms Fiche Circulation Imaging Production Records Series

View an Imaging Production Cancel

Activity Search and View Data Manipulation Data Removal Cart

Request Delivery

Request Pickup

Export

Imaging Production # 0000778910

Organization Information: Texas Big State Agency - 988 - Central

Agency Name: Texas Big State Agency - 988

Division Name: Central

Contact Name: Johnny Agency

Contact Phone # (and extension): 512-555-5000 x75

Will Created Media be stored at SRC?: ☒

Will Source Media be stored at SRC?: ☐

To send the Imaging Production to the State Records Center's Imaging Department, you must:

1. Click **Activity**.
2. Select **Request Pickup** and go to **Request Items to be Picked Up** screen on the next page.

## Imaging Production: Create a Work Order for the SRC's Imaging Department

### Request Items to be Picked Up screen

Request Items to be picked up

Items to be picked up:

Page 1 | Jump to Page: [ ] Go

Change Destination	Record Description	Current Location	Home Location	Destination
Apply	0000819218 - Texas Big State Agency - 988 - Central	Johnny Agency	Imaging Production - 0000777351	Imaging Production - 0000777351

Apply All

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Search

Comments:

The areas on this screen:

1. **Record Description:** The Imaging Production Barcode and the Organization you assigned to this Imaging Production.
2. **Current Location:** Your name is listed as the person who created this Imaging Production.
3. **Home Location:** Imaging Production.
4. **Destination:** Imaging Production.
5. **Search:** Not used for this task.
6. **Comments:** Not used for this task.

### Request Results screen

Request Results

1 request succeeded

Your request for the '0000819218 - Texas Big State Agency - 988 - Central' Imaging Production was successfully submitted

Ok

Confirmation that your Imaging Production request has been submitted to the State Records Center's Imaging Department. Click **OK**.

To cancel any Request, please see **Appendix: Cancel a Request (Pickup or Delivery)**.

### Imaging Production: Create a Work Order for the SRC's Imaging Department

## NOTES

[illegible]

# Appendix:

## Definitions

**# of Fiche Pulled:** The number of items you are requesting on a Fiche Circulation.

**# of Pulls:** This is a field used for billing in Fiche Circulation. The data entered into this field will always be 1.

**Action Menus:** The dropdown menus on each Homepage Grid. The Action Menus are: Activity, Search and View, Data Manipulation, Data Removal, and Cart.

**Activity:** The dropdown Action Menu used for moving things around the TexLinx system.

**Addition:** The process to add more information to an existing reel of film. Additions are not completed for microfiche in the State Records Center's Imaging Department.

**Alternate Fulfillment Method:** When requesting delivery, the Alternate Fulfillment Method is a dropdown menu to designate a delivery as a Rush or as a Permanent Withdrawal.

**Asterisk (\*):** This is used to identify a required field. If this field is not completed, the information entered into other fields cannot process.

**Barcode:** The unique identification number assigned to everything created in TexLinx.

**Boxes item type tab:** The item type tab used for everything associated with boxes in TexLinx.

**Bulk Update:** This is used update the same information to a selected group of items. Only the fields completed bulk update.

**Bundle:** A small collection of microfiche jackets using the same Record Series Title that have been manually separated from a large amount of microfiche jackets. Each bundle is created as its own container in TexLinx. A good rule of thumb when creating a bundle is to keep the number of microfiche jackets at 200 or less. Each bundle is assigned a Reel Number by the agency entering the information into TexLinx.

**Carry Forward:** This is when some fields completed during Create are brought forward to a new data entry screen.

**Cart:** A place in TexLinx to gather items for an individual Item Type tab that you want to use at a later time.

**Create:** This appears in the Data Manipulation dropdown Action Menu. Create is used when creating new information in TexLinx.

**Creating Dialogue Box:** This dialogue box appears when any item is created in TexLinx. The information in this box begins with a progress bar and the resulting information explains how many items were created and if a single item is created, the Barcode for that item appears.

**Dashboard:** A pop-up screen that shows items checked out to a user as well as a user's open requests that have not been completed, yet. Preferences can also be found here in addition to the Preferences option in the Navigation Menu.

**Data Manipulation:** The dropdown Action Menu used for creating and editing information. Search and replace is also performed here.

**Data Sheet:** This appears only on the Boxes and Microforms item type tabs. It appears under the Data Manipulation dropdown Action Menu. The Data Sheet is used to create a set of boxes or microforms for one Records Series at a time.

**Data Removal:** An Action Menu used to delete an item from view in TexLinx.

**Delete:** Selecting an item on the homepage grid and choosing this option under the Data Removal

## APPENDIX: Definitions

Action Menu will delete an item from view. This does not remove the item from TexLinx, it just moves it to Deleted status and most users will not see this item anymore.

**Disaster Recovery item type tab:** The item type tab used to create Disaster Recovery containers for the Disaster Recovery Vault at the State Records Center. This tab is also used to request delivery for items designed with Will Call return.

**Drive Date:** The Drive Date is used in conjunction with Event Based, Total Retention, and the Event Trigger to calculate the Eligible Destruction Date. This field auto-completes when left blank for Total Retention values that use only years and or months and do not have us an Event Based acronym. This field also auto-completes when FE (fiscal year end) and CE (calendar year end) are used as the Event Based acronym.

**Duplicate:** An identical reproduction of an existing reel of microfilm or a jacket of microfiche.

**Event Based:** Event based is a series of acronyms used as part of the Total Retention. The acronyms are: AC, after close; AV, administratively valuable; CE, calendar year end; FE, fiscal year end; LA, life of asset; PM, permanent; PS, purpose served; US, until superseded

**Event Trigger:** This field explains what the Event Based acronym means.

**Export:** The process of moving a selected set of information from TexLinx to a text-based source.

**Fiche Circulation:** The item type tab used to request delivery and request pickup for individual Microfiche Jackets.

**Files item type tab:** The item type tab used for files.

**History:** Found under the Activity Menu for Search and View, History is a roadmap that details each time an action was performed upon the item from when it was created up to the last time the item was updated or a request was completed.

**Homepage Grid:** This shows the inventory that exists in TexLinx for items assigned to that item type tab.

**Imaging Production item type tab:** The item type tab used to create a work order for the Imaging Department at the State Records Center.

**Infolinx:** The software designer for TexLinx.

**Infolinx System Fields:** Fields on the lower half of the View screen used to identify the history for that item.

**ISNOTNULL:** Means Is Not Null. It is used for Search to find items where the field is not empty.

**ISNULL:** Means Is Null. It is used in Search to find items where the field is empty.

**Item Type Tabs:** The tabs near the top of the screen that are assigned to you based upon the permissions assigned to you by your agency's Records Management Officer or Records Management Liaison.

**Jacket:** A single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. Often times a jacket or a group of jackets are inserted into a paper folder as a safeguard to protect the information in the jacket. A small collection of jackets are known as a bundle.

**Key Word Search:** A Search function in each Item Type Tab that allows the user to select a field and enter a key word or phrase into a text field to search a specific tab for that information in that field.

## APPENDIX: Definitions

**Logout:** Logout is found at right side of the Navigation Menu. To avoid Time Out, each user should Logout at the end of each session or when they know they are leaving the screen idle for an extended period of time.

**Microfiche:** A single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. Often times a jacket or a group of jackets are inserted into a paper folder as a safeguard to protect the information in the jacket. A small collection of jackets are known as a bundle.

**Microforms:** In TexLinx, microforms is the umbrella term for microfilm and microfiche. It is also the reference source in Fiche Circulation to identify the Microfiche Bundle from where Microfiche Jackets were pulled in the State Records Center.

**Microforms item type tab:** This is the item type tab for microfilm and microfiche.

**Mil:** This is a unit of measurement for microfilm thickness. 1 Mil = 0.001 (1/1,000th) of an inch.

**Navigation Menu:** The areas at the very top of TexLinx screen.

**Organization:** The base Organization is the state agency. Organization is also expanded to include Division, Business Unit, and Business Sub-Unit.

**Override:** This is a clickable checkbox used on the Create screen to override the Drive Date created when it is auto-calculated in TexLinx. The Drive Date is auto-calculated when there is only a number of years and/or months used as the Total Retention or when CE or FE is used as an Event based acronym. Override does not need to be clicked when the Event Based acronyms AC, LA, PM, PS, are US are used.

**Permanent Withdrawal:** A delivery option for Alternate Fulfillment Method when requesting delivery. Permanent Withdrawal (also known as Permanent Transfer) is selected when an item is being delivered from the State Records Center and will not be returned. Selecting this option may incur an additional fee. The only instances when the fee is waived is for: individual files from a box, microfiche jackets that are part of but not the complete bundle of microfiche; and all Disaster Recovery boxes.

**Permissions:** Rights assigned to a Role to all users in TexLinx.

**Pipe Symbol:** A vertical line used as a separator between the beginning file and ending file information in the Beginning File | Ending File Range in the Create, Update, and Data Sheet screens for Boxes and Microforms. The Pipe Symbol is created by holding down SHIFT on the keyboard and pressing the \ key. The Pipe Symbol generated is a vertical line that looks like this: | Do not used the Pipe symbol for any TexLinx field other than Beginning File | Ending File Range.

**Preferences:** Depending upon the permissions a user has been granted by the agency's Records Management Officer or Records Management Liaison, there may be many options here. But everyone who can see information in TexLinx can go here to adjust how many items that are viewable in any homepage grid. This is done by clicking the Home Page icon and completing the field for "Number of records per page displayed in grid".

**Query:** Fields use equations to generate a search for a specific tab.

**Quick Search:** Search boxes arranged horizontally, usually found between the item type tabs and the Action Menu dropdown menus.

**Records Management Liaison:** The individual assigned by an agency's Records Management Officer or the agency head to act as an assistant to the Records Management Officer.

**Records Management Officer:** The individual assigned by an agency head to be the person

## APPENDIX: Definitions

responsible for all records management responsibilities at his or her agency.

**Request Delivery:** This is used to request delivery from the State Records Center.

**Request Pickup:** This is used to request pickup from an agency.

**Rights:** Each Role has a list of security items (rights) that allow a user assigned to that Role to perform in TexLinx.

**Role:** The assignment given to a user by the agency's Records Management Officer or Records Management Liaison that determines what the individual sees and does in TexLinx.

**Rush:** A delivery option for Alternate Fulfillment Method when requesting delivery. Rush is selected when an item needs to be delivered from the State Records Center immediately or prior to the next regularly scheduled delivery within the next business day. Selecting this option for any number of items incurs an additional fee.

**Save & Close:** This is used in the Create and Data Sheet screens when creating one item and the user is not ready to submit a Request Pickup or it is used after a user has created a series of items in TexLinx.

**Save & New:** This is used after a user has created an item and wants to create another item. Some fields may carry forward.

**Save & View:** This is used after creating a single item to review the information entered and to Request Pickup.

**Search & Replace:** An edit option found under the Data Manipulation Action Menu. This allows a user to search a selected amount of items and replace an exact term or phrase with another term or phrase for all of the items found.

**Time Out:** When a user is logged into TexLinx and leaves the screen idle for an extended period of time, time out occurs once the 20-minute timer at the top of the screen reaches zero. Time Out holds the user's position for 24 hours. There are a limited number of positions available in TexLinx so it is recommended all users Log Out when finished for each session.

**Transfer:** This is used from the Activity dropdown Action Menu to place a file or a group of files into a box that is not at the State Records Center.

**Tex Says:** Helpful tips in the Instruction Guide to give more information than was provided in a previous instruction.

**TexLinx:** The software used by the Texas State Library to help state agency users access their storage inventories at the State Records Center, see and update their Records Retention Schedules, request deliveries from and pickup items to be sent to the SRC, and to register for training classes.

**TexLinx Resources:** This is found at the top of each TexLinx page. Click here to go to the area of TexLinx where training materials are found as well as other TexLinx-related items.

**Update:** This is used from the Data Manipulation dropdown Action menu to correct or adjust information for an item that appears in TexLinx.

**View:** Found under the Search and View Action Menu. This allows a user to view data for an item in TexLinx.

**Wild Card:** This is the percent % symbol. It is used in any search or Quick Search field to find items with information in that field when the user does not have a specific search term to use. This oftentimes generate many results so it is suggested this search option be used sparingly.

**Will Call return:** Select this from the Return Type dropdown menu when creating an item in Disaster Recovery.

## APPENDIX: Definitions

## NOTES

[illegible]

## APPENDIX: Definitions

## NOTES

[illegible]

# Appendix:

## Search

**To search, use the Quick Search fields at the top of each item type tab screen or activate the Search option under the Search and View action button**

Unless instructed otherwise, do not use spaces when using search symbols.

### **Using the Wild Card % key to search:**

If you do not have specific information to perform a search, enter the percent sign % into any field. % is used as the Wild Card in TexLinX. The search results generate for any items that have information in that field. This may result in a large number of findings so use this search option sparingly unless you want a large amount of information. It is a good search option for viewing an entire inventory for an item type tab.

---

### **To search for a single item:**

Type the information into any number of Quick Search field in the top section of an item type tab (Boxes, Files, Disaster Recovery, Microforms, etc.) or into any fields in the Search screen found in the Search and View dropdown menu.

---

### **To search for a series of items:**

> is used to search for items greater than the search item.

**Example:** >500 would search for items greater than 500

< is used to search for items less than the search item.

**Example:** <500 would search for items less than 500.

>= is used to search for items matching and greater than the search item.

**Example:** >=500 would search for 500 and items greater than 500.

<= is used to search for items matching and less than the search item.

**Example:** <=500 would search for 500 and items less than 500.

<> is used to search for a range.

**Example:** To find all containers numbered 500-775, enter: >=500<=775

### **To search for a non-consecutive set of items:**

Use OR between the terms with a space on each side of OR.

**Example:** to search for container numbers 600, 603, 611, and 815; enter: 600 OR 603 OR 611 OR 815

**TEX SAYS** *Since the Box# and Reel# fields are designed as text fields and not numeric fields, searching for a specific container number or a range of container numbers may not yield desired results.*

## APPENDIX: Search

### Using Query from the Search and View action button

This is a more complex search tool.

Disregard the checkbox on the left side of the screen.

Column is used to identify the field you want to perform the search.

Operator is the action to be used.

Criteria: search information is entered here.

Logic:

Using OR: Field1 = A or B – records where Field1 = A or Field1 =B would be returned

Using AND: Field1 = A and Field2 = B – records where Field1 = A and Field2 =B would be returned – both fields would have to match

Sort Type:

Ascending means the lowest search result appears at the top of the grid

Descending means to highest search result appears at the top of the grid

Disregard the fields Sort Order and Receive Scan

=	EXACT
Between	RANGE
>	GREATER THAN
<	LESS THAN
>=	GREATER THAN OR EQUAL
<=	LESS THAN OR EQUAL
><	GREATER THAN AND LESS THAN
In	List with comma
NotIn	Omit: List with comma
IsNotNull	Field with information
IsNull	Field with no information
Like	CONTAINS
NotLike	DOES NOT CONTAIN

## APPENDIX: Search

## NOTES

[illegible]

## APPENDIX: Search

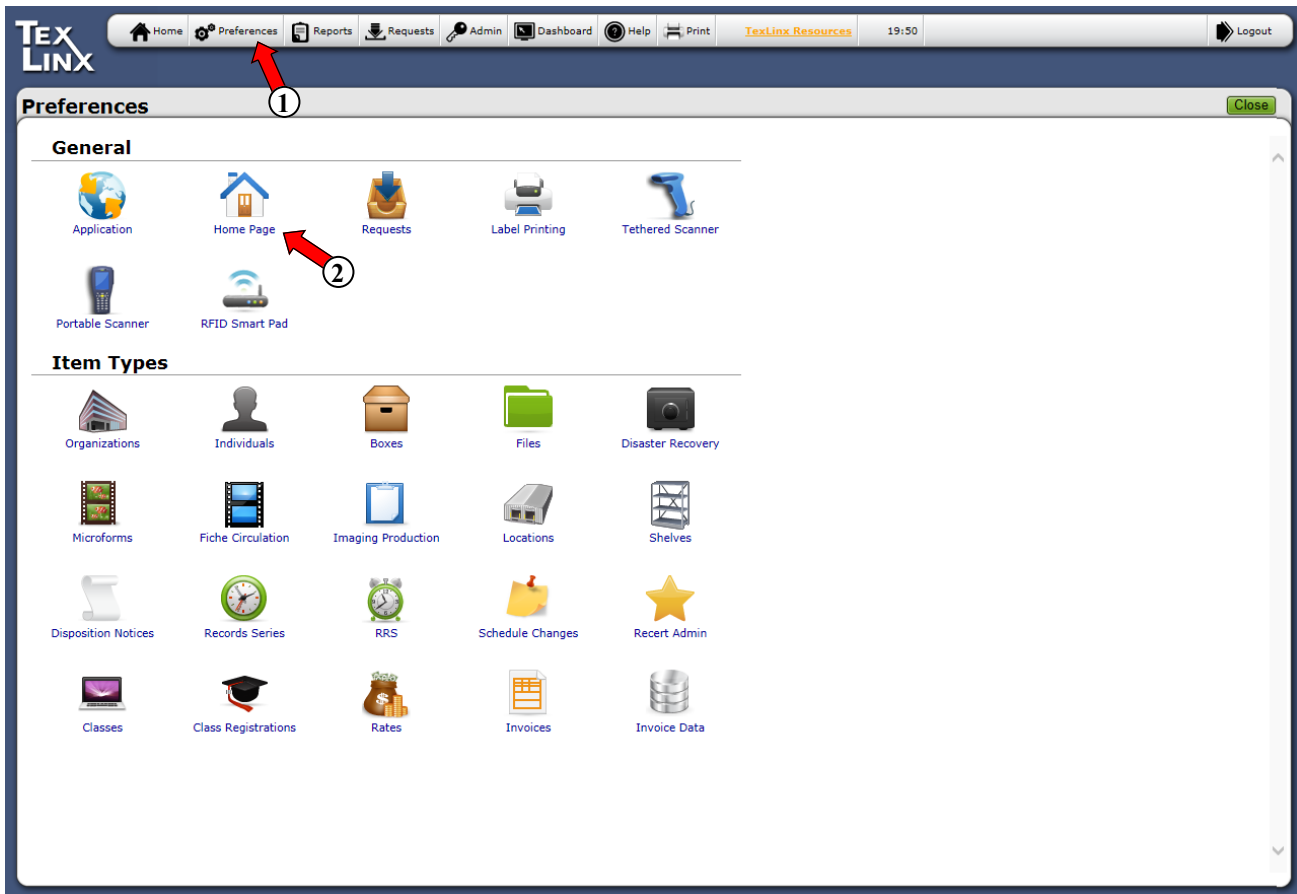
## NOTES

[illegible]

# Appendix: Preferences

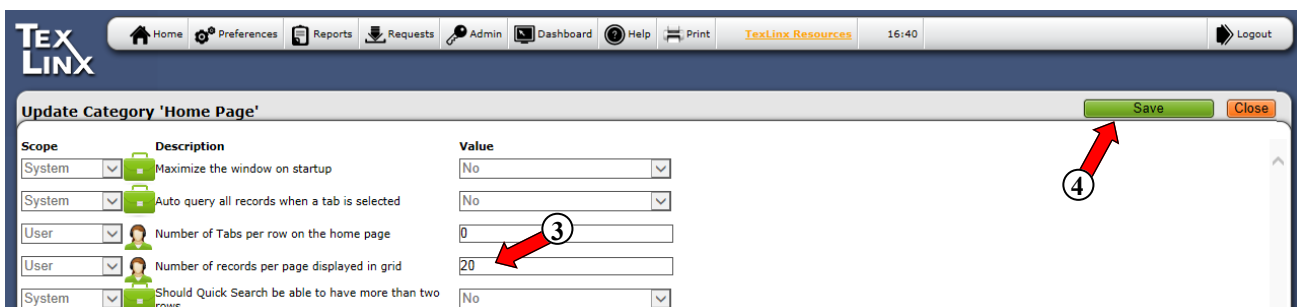
Depending upon the Permissions allowed in your Role, there may be many things you can do here or a very limited number of options.

The one thing all users can do here is to access the Home Page. (This is also found in the **Dashboard** (see **Appendix: Dashboard**).



The Home Page is where users go to adjust the amounts of rows of information appear on the homepage grid. To adjust the number of homepage grid rows:

1. Click **Preferences** at the top of the screen in the Navigation Menu
2. Click **Home Page**.



Edit the number the appears in the field for **Number of records per page displayed in grid** (3) and click **Save** (4). The number you enter will be the number of rows you will see on the homepage grid for each tab.

## APPENDIX: Preferences

## NOTES

[illegible]

# Appendix:

## Alternate Fulfillment Method

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TexLinX Resources 19:46 Logout

### Request Items

Clicking the Request button will move the following items to the 'Johnny Agency' Individual

Change This List Page 1 | Jump to Page: Go

Record Description
Remove 0000774355 89a21

Enter Number of Files Enter File Info

Items will be requested to this location:

Enter, scan, or click the Search button to specify the desired destination: Johnny Agency 0000774385 Search

Comments:

Alternate Fulfillment Method: Rush Permanent Withdrawal

Alternate Fulfillment Method (1) is an available option when completing a Request Delivery in TexLinX. Unless a **Rush** delivery or a **Permanent Withdrawal** is needed, you will not activate this field. This is found on the Request Items screen. Click the dropdown menu (2) to make a selection:

- **Rush:** A delivery option for Alternate Fulfillment Method when requesting delivery. Rush is selected when an item needs to be delivered from the State Records Center immediately or prior to the next regularly scheduled delivery within the next business day. Depending upon the number of items requested for Rush delivery, the deadline is 3:30 p.m. **Selecting this option for any number of items incurs a Rush fee.** When selecting RUSH, please call the SRC Circulation Desk (512-475-5155) to alert the State Records Center about this RUSH delivery and to confirm delivery for that same day.
- **Permanent Withdrawal:** A delivery option for Alternate Fulfillment Method when requesting delivery. Permanent Withdrawal (also known as Permanent Transfer) is selected when an item is being delivered from the State Records Center and will not be returned. **Selecting this option may\* incur a Permanent Withdrawal fee.**

\*The Permanent Withdrawal fee is waived for:

- Individual files delivered from a box at the State Records Center.
- Microfiche Jackets that amount to part of, not all of, a microfiche bundle.
- Disaster Recovery boxes.

## APPENDIX: Alternate Fulfillment Method

## NOTES

[illegible]

# Appendix:

## Calculate the Drive Date

The **Drive Date** is a required field on the Create and Data Sheet screens in the Item Type tabs for Boxes and Microforms. It is used, in conjunction with Event Based **(1)** (when applicable) and Total Retention **(2)** (years, months, and or days) for the Record Series selected to calculate the Eligible Destruction Date is calculated.

Activity Search and View Cart (0 items)

[ 1 ] Page 2 [ 3 ] [ 4 ] | Jump to Page: Go The search found 35 Records Series

	Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Remarks	Approval Status
<input type="checkbox"/>	Texas Big State Agency - 988	12		Income Adjustment Authorization	PM			15-988-012	Approved
<input type="checkbox"/>	Texas Big State Agency - 988	14		Leveling Enrollment & Cancellation Forms	FE	50		15-988-014	Approved
<input type="checkbox"/>	Texas Big State Agency - 988	15		Inventory, Annual	CE	25		15-988-015	Approved
<input type="checkbox"/>	Texas Big State Agency - 988	16		Complaint Investigations		75		15-988-016	Approved
<input type="checkbox"/>	Texas Big State Agency - 988	17		Requests for Printing/Distribution	AC	2	6	15-988-017	Approved

The following page is a guide to help you determine the Drive Date for items created in TexLinx.

# Calculate the Drive Date

The Drive Date is used to help calculate the Eligible Destruction Date of records sent to the Texas State Library for Storage at the State Records Center. A Drive Date is required to calculate the Eligible Destruction Date.

Drive Date + Total Retention = Eligible Destruction Date

--or--

Eligible Destruction Date – Total Retention = Drive Date

## If the Total Retention

### contains...

### The Drive Date is...

AC..... The Close Date\* for the records. Any date between the Final Inclusive Date and the day the Request Pickup is being submitted.

FE..... August 31 of the Fiscal Year of the Final Inclusive Date.  
(Fiscal Year = Sept. 1 to Aug. 31)  
Example: Final Inclusive Date: 10/15/2014, Drive Date is 08/31/2015

FFE..... September 30 of the Federal Fiscal Year of the Final Inclusive Date.  
(Federal Fiscal Year = Oct. 1- Sept. 30)  
Example: Final Inclusive Date: 12/15/2014, Drive Date is 09/30/2015

LA..... When the Life of Asset for the record has expired. Any Close Date\* between the Final Inclusive Date and the day the Request Pickup is being submitted.

US..... When the record has been superseded. Any Close Date\* between the Final Inclusive Date and the day the Request Pickup is being submitted.

PS..... When the record has fulfilled its Purpose Served. Any Close Date\* between the Final Inclusive Date and the day the Request Pickup is being submitted.

AV..... When the record is no longer administratively valuable. Any Close Date\* between the Final Inclusive Date and the day the Request Pickup is being submitted.

Years and/or

Months Only..... Any Close Date\* between the Final Inclusive Date and the day the Request Pickup is being submitted.

PM..... Any Close Date\* between the Final Inclusive Date and the day the Request Pickup is being submitted. There is no disposal date for Permanent records but a Retention Drive Date is required in case the Retention amounts are changed in the future.

\*Close Date is the date when records are no longer active. The agency user determines this date.

## APPENDIX: Calculate the Drive Date

## NOTES

[illegible]

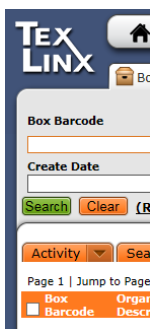
## APPENDIX: Calculate the Drive Date

## NOTES

[illegible]

# Appendix:

## Cancel a Request (Pickup or Delivery)

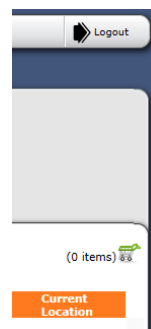


In any tab, information:

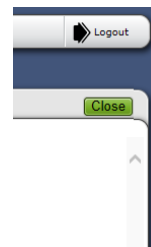
**Permissions for this process have been disabled.  
Call 512-475-5155 to cancel any request.**



Next, select the View Request request option

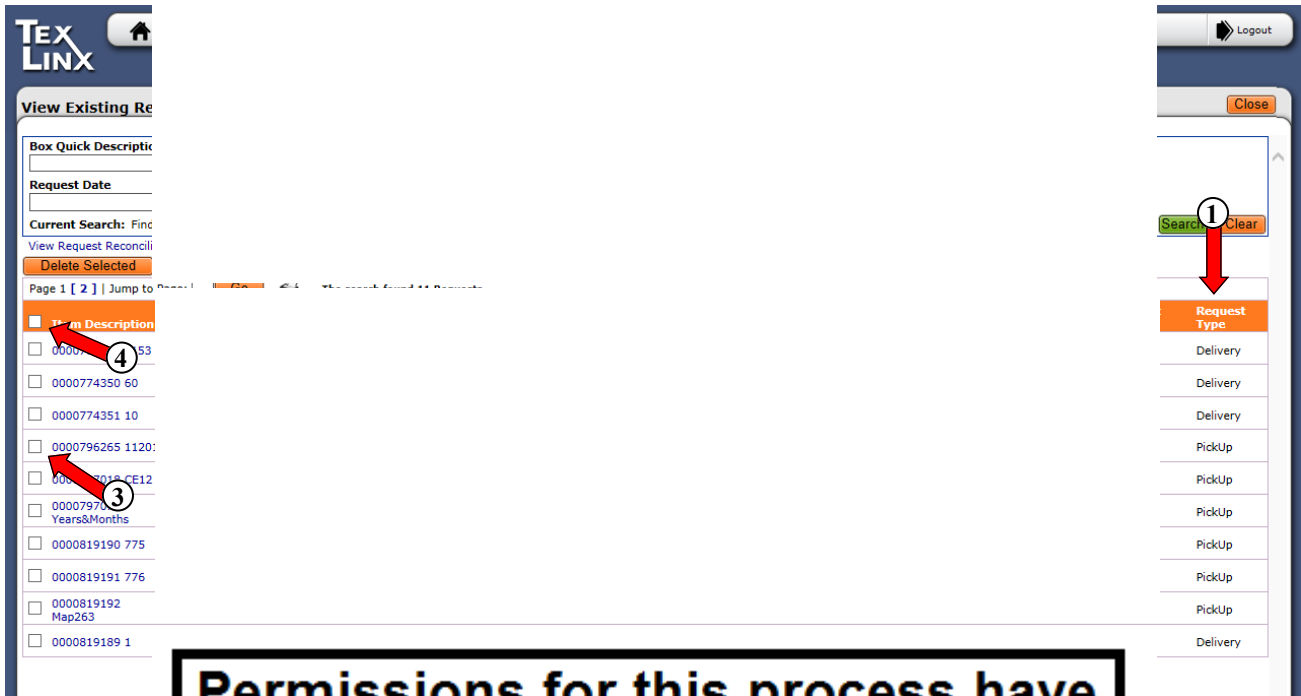


request



selected but her

APPENDIX: Cancel a Request (Pickup or Delivery)



You can see a list of requests. Click the checkbox to select the request. Select All requests that you want to cancel.

**Permissions for this process have been disabled.  
Call 512-475-5155 to cancel any request.**

different kinds of containers (e.g., you want to cancel the pickup of the containers).

This process is used to cancel a request.

**TEX SAYS**

single screen below the table.

near in a large numbers.

## APPENDIX: Cancel a Request (Pickup or Delivery)

## NOTES

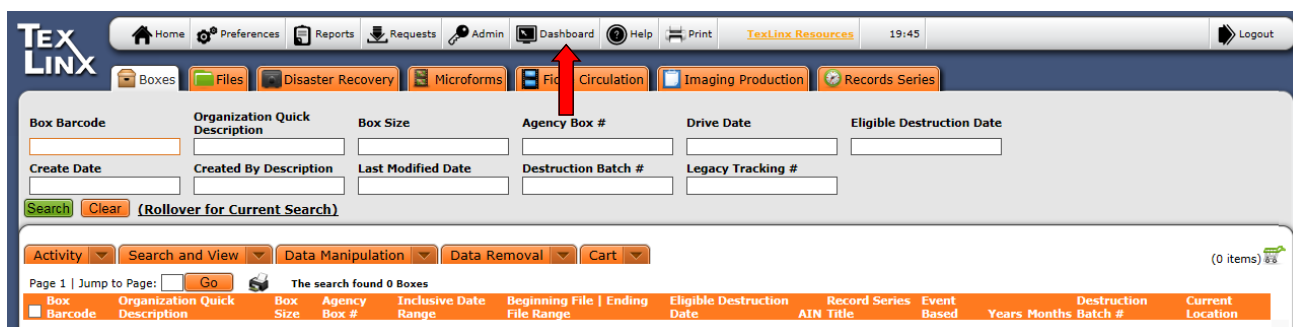
[illegible]

## APPENDIX: Cancel a Request (Pickup or Delivery)

## NOTES

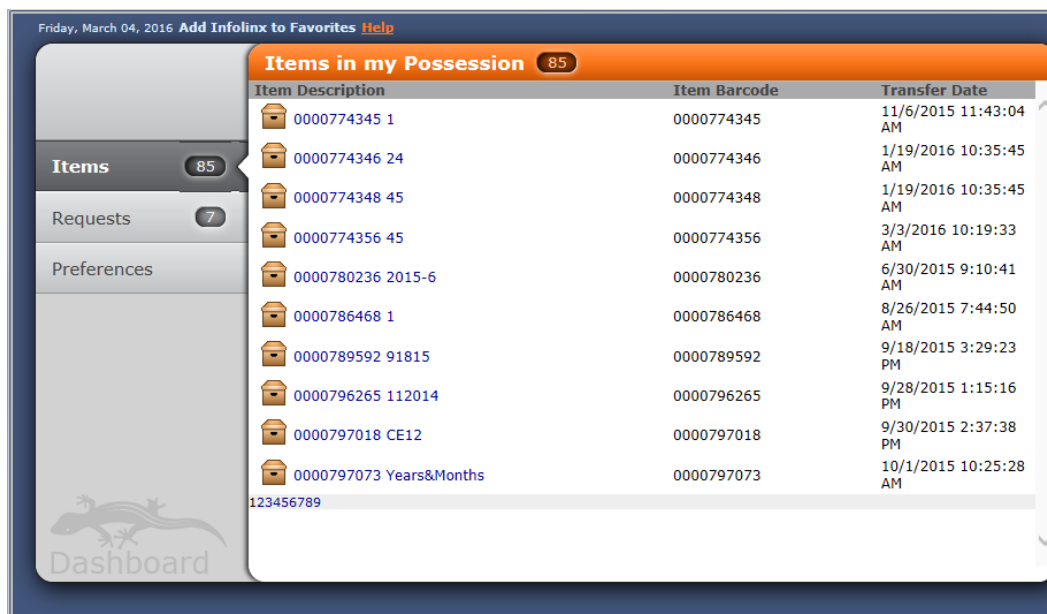
[illegible]

# Appendix: Dashboard



**Dashboard** is a TexLinX interface where a user can see items in the user's possession, open requests, and preferences. **Preferences** and **Requests** from the Navigation Menu are consolidated into this area.

Click **Dashboard** in the Navigation menu at the top of the screen.






A pop-up screen opens with three side tabs:

- **Items**
- **Requests**
- **Preferences**

The active side tab appears as dark gray with a white arrow indicating the information showing on the screen is for that side tab. Inactive side tabs appear as light gray.

The symbols used in **Items** and **Requests** identify the type of item:

	Boxes		Microforms (Microfilm / Microfiche)
	Files		Fiche Circulation
	Disaster Recovery		Imaging Production

## APPENDIX: Dashboard

### Items in my Possession screen

Item Description	Item Barcode	Transfer Date
0000774345 1	0000774345	11/6/2015 11:43:04 AM
0000774346 24	0000774346	1/19/2016 10:35:45 AM
0000774348 45	0000774348	1/19/2016 10:35:45 AM
0000774356 45	0000774356	3/3/2016 10:19:33 AM
0000780236 2015-6	0000780236	6/30/2015 9:10:41 AM
0000786468 1	0000786468	8/26/2015 7:44:50 AM
0000789592 91815	0000789592	9/18/2015 3:29:23 PM
0000796265 112014	0000796265	9/28/2015 1:15:16 PM
0000797018 CE12	0000797018	9/30/2015 2:37:38 PM
0000797073 Years&Months	0000797073	10/1/2015 10:25:28 AM

The first side tab **Items** opens to **Items in my Possession**. These items have been delivered to you or have been created by you in TexLinx and not yet received into the State Records Center. Anything with your name in **Current Location** anywhere in TexLinx appears here. The number that appears on the tab tells how many items are assigned to you in TexLinx. Click the blue hyperlink to open the **View** screen for the item's tab. You do not see deleted or Permanently Returned items but they calculate into the number of items assigned to you.

### My Requests screen

Item Description	Item Barcode	Request Date	Destination	Requestor	On Waitlist
0000819189 1	0000819189	1/27/2016 3:32:54 PM	Johnny Agency	Johnny Agency	No
cj010 0000819214	0000819214	1/28/2016 10:01:13 AM	Jane Division	Johnny Agency	No
cm005 0000819215	0000819215	1/28/2016 10:01:13 AM	Jane Division	Johnny Agency	No
jg024 0000819216	0000819216	1/28/2016 10:01:13 AM	Jane Division	Johnny Agency	No
0000819218 - Texas Big State Agency - 988 - Central	0000819218	1/28/2016 1:53:11 PM	Imaging Production - 0000777351	Johnny Agency	No
0000819233 - Texas Big State Agency - 988 - Central	0000819233	2/25/2016 9:59:41 AM	Jane Division	Johnny Agency	Yes
0000819233 - Texas Big State	0000819233	3/1/2016 3:52:58	0000774384	Johnny	No

Click **Requests** side tab to open **My Requests**. This shows all open requests you have submitted thru TexLinx. Once a Request is completed at the State Records Center, the request will disappear from this screen. The number that appears on the Requests side tab tells you how many open requests you have in TexLinx.

Click the blue hyperlink to open the **View** screen for the tab where that item appears.

## APPENDIX: Dashboard

### My User Preferences screen

Friday, March 04, 2016 Add Infolinx to Favorites [Help](#)

### My User Preferences

**Application**

Description	Value
Show Alert box when creating records	Yes ▾
Show Alert box when transferring records	Yes ▾

**Home Page**

Description	Value
Number of Tabs per row on the home page	0
Number of records per page displayed in grid	20

**Label Printing**

Description	Value
Printed labels expiration in days	1
Auto-delete labels after printing from queue	No ▾

**Individuals**

Description	Value
Should Infolinx display the associations column on the home page grid?	No ▾
Should Infolinx display the contents column on the home page grid?	No ▾
Should Infolinx auto query Individuals on Transfer and Request pages	No ▾
Enable carry forward when creating new Individuals	Yes ▾

Dashboard

The only information you will want to edit on this screen is the field **Number of records per page displayed in grid**. Edit this field to change the number of rows of information that appear in the homepage grid for every tab you use in TexLinx. After you change the value, click **Save** at the top of the screen.

**TEX SAYS** *Changing any other data fields (**Default Current Location**, **Default Home Location**, **Default Request Destination**) on this screen could result in delivery / pickup problems. So, as a rule, please do not change any information on this screen other than the field **Number of records per page displayed in grid**.*

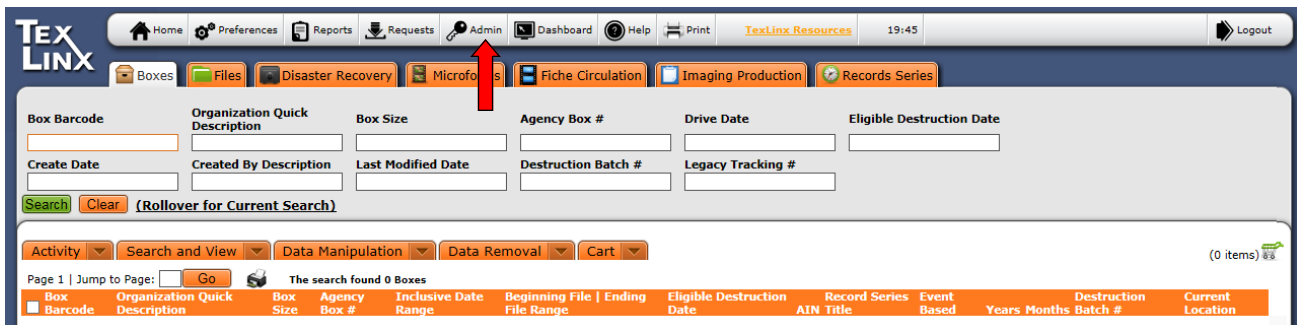
## APPENDIX: Dashboard

## NOTES

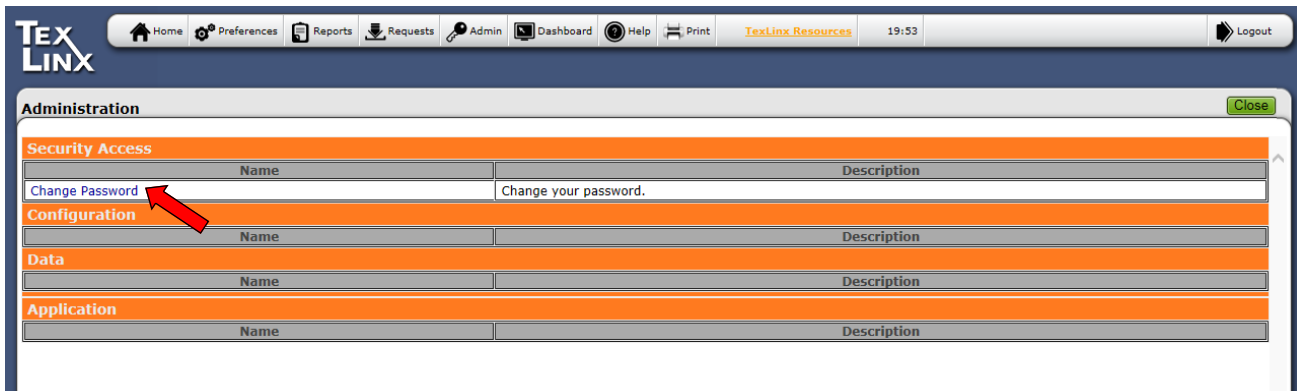
[illegible]

# Appendix:

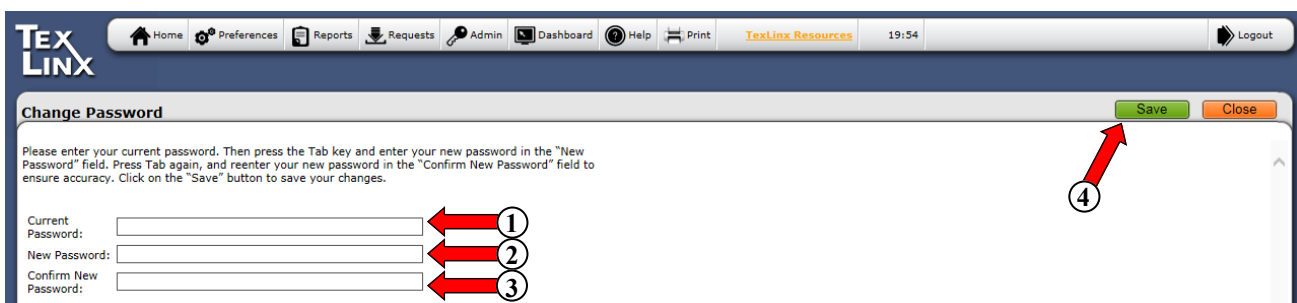
## Change Your Password



TexLinx requires users to change the password on a regular schedule. However, if you need to change your password prior to being prompted to change it, click **Admin** in the Navigation Menu at the top of the screen. Administration is used for many technical elements in TexLinx but your permissions will limit what you can do on the Admin page.



Click **Change Password** to begin the process.



Password requirements are:

- Between 8 and 32 characters
- At least one number
- At least one upper case letter
- At least one lower case letter
- Symbols are optional

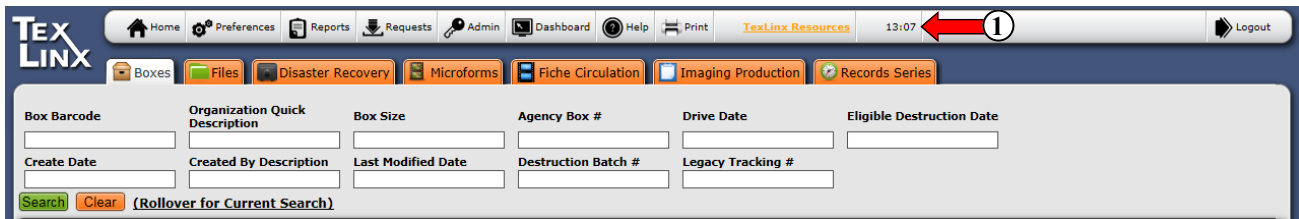
1. Enter your **Current Password**
2. Enter your **New Password**
3. **Confirm New Password**
4. Click **Save**.

## APPENDIX: Change Your Password

## NOTES

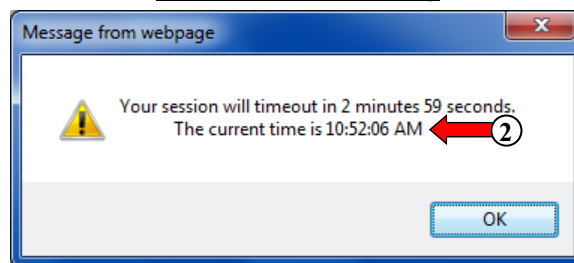
[illegible]

# Appendix: Timer



At the top of each TexLinx screen is a timer (1) to remind you how much time is left in your current session before you are timed out.

## Timeout Warning



A reminder pop-up window appears when there is time remaining of 3 minutes, 2 minutes, and 1 minute in the current session before you are automatically timed out.

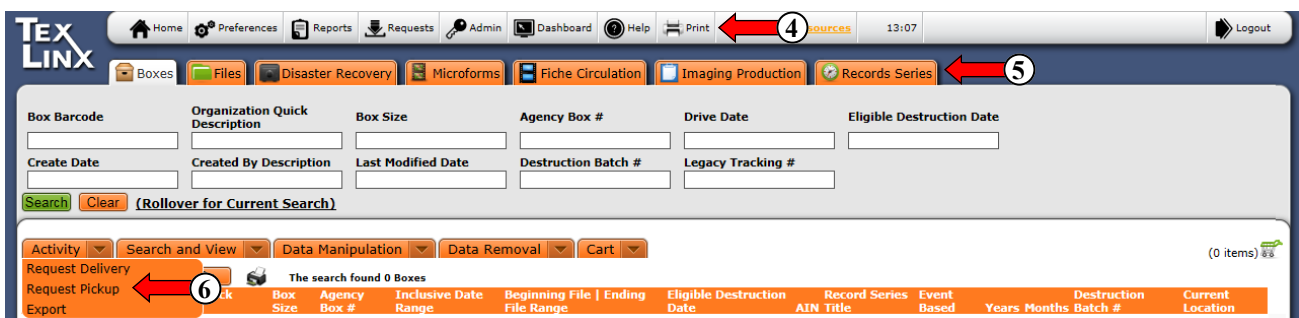
The “current time” (2) mentioned in the warning is the time when the warning was posted.

## Reset the Timer

Just because the current session is 20 minutes, it does not mean what you are doing has to be finished in 20 minutes. There are a number of ways for you to reset the time:



Click a radio button (3) (like those found in the Organization section when creating an item).



Select an item in the Navigation Menu (4), the Item Type tabs (5), or one of the dropdown menu options (6) in the Actions Menus all of which moves you to another screen.

**TEX SAYS** *The best option to reset the timer is to click a radio button because you can click back to the original selection and you will not leave the screen where you are currently working.*

## APPENDIX: Timer

## NOTES

[illegible]

# Appendix: Export

The process to export items from TexLinX to a spreadsheet program begins with a search.

## Use Search

The screenshot shows the TexLinX main interface. At the top is a navigation bar with links: Home, 1. Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TexLinX Resources, and Logout. Below this is a secondary bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main content area has several search fields: Box Barcode, Organization Quick Description, Box Size, Agency Box #, Drive Date, and Eligible Destruction Date. There are also fields for Create Date, Created By, Last Modified Date, Destruction Batch #, and Legacy Tracking #. A 'Search' button is highlighted with a red arrow and a circled 3. A 'Clear' button and a '(Rollover for Current Search)' link are also present. Below the search fields is a 'Search and View' dropdown menu, which is open, showing options: Search, Key Word Search, Query, View, and History. A red arrow and a circled 5 point to the 'Search' option. A red arrow and a circled 2 point to the 'Search' button. A red arrow and a circled 4 point to the 'Search and View' dropdown menu. A red arrow and a circled 1 point to the 'Boxes' tab.

1. Click the item type tab from where you want to export information. This is where you will first perform a **Search** (in this example, the Boxes tab is being used).
  2. Enter search terms into any of the **Quick Search** fields to find the box or boxes.
  3. Click **Search**. (continue on Page 208, **Search Results** screen).
- OR
4. Click **Search and View**.
  5. Select **Search** (continue below).

## Search Boxes screen

The screenshot shows the 'Search Boxes' screen. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, TexLinX Resources, and Logout. Below this is a 'Search Boxes' header with 'Execute' and 'Cancel' buttons. The main content area has several search fields: Organization, Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Nickname. There are also fields for Search Here, Current Search, Agency Name, Division Name, Business Unit Name, Sub Business Unit Name, Record Series, Organization Quick Description, AIN, RSIN, Record Series Title, Event Based, Years, Months, Days, Event Trigger, Archival, Vital, Remarks, Legal Citations, and Approval Status. A 'Search' button is highlighted with a red arrow and a circled 1. A red arrow and a circled 2 point to the 'Execute' button.

Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the item(s) that you want to export information. This search (1) is for all boxes for the Record Series Title “Employee Earnings Records”. Press **Execute** (2).

## APPENDIX: Export

### Search Results screen

Regardless of the search method used from the previous page, the above screen is your next destination.

Click the checkbox (1) for the containers you want to export information. You can see from the **Current Location** column (2) which boxes are currently with you or someone at your agency. If you see ⚠ (3) in the Current Location column, that indicates the box is at the State Records Center. Click the checkbox (4) on the orange ribbon if you want to select all\* of the containers.

\* **TEX SAYS** The grid has as many container rows as your Preferences allow. If you need to see or request all of the containers you have searched but they are on multiple pages (5), increase/decrease the number of containers shown:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.

## Export

After clicking the appropriate checkbox(es) for the item(s) you want to export:

1. Click **Activity**.
2. Select **Export**.

## APPENDIX: Export

### Export Home Page Grid screen

1. **Enter Field Delimiter:** This is what will separate the fields when the results are opened in Notepad. The Pipe symbol is the default setting. Please keep that setting.
2. **Available Box Fields:** These are the fields that are on the tab where you are performing the export. Any tab you double click in this column will be moved to the Box Fields to Export on the right.
3. **Box Fields to Export:** These are the fields you selected from Available Box Fields. The order the fields appear in this column, top to bottom, is the order these fields will appear in Notepad. To change the order, click once on the Field Name and click the Up arrow or the Down arrow on the right. Click Clear at the bottom to erase your selections and start over.
4. **Location Info:** Choosing Barcorde or Quick Description will determine how the information appears for Current Location, Home Location, and/or Hub Location if any of those fields are selected by you.
5. **Saved Export Profiles:** If you want to share the current field choices (which makeup an Export Profile) or if you want to use a saved Export Profile, click the + sign. The fields will autopopulate
6. **Export Selected:** After you complete the column for Box Fields to Export, the amount of checkboxes you clicked on the Homepage Grid appears here. And will export if you click Export Selected.
7. **Export Query:** After you complete the column for Box Fields to Export, the total number of results from the search you did appears here. If you click Export Query, all of the items from the search you did will export, not just those that you clicked a checkbox.

## APPENDIX: Export

### View File

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 19:55 Logout

Export Home Page Grid Close

Enter Field Delimiter  Number Of Records to Export

Export Selected Export Query View File Selected Export File Created

Location Info: Barcode

Saved Export Profiles +

Available Box Fields

- Accessioned
- Actual Destruction Date
- Agency Name
- Agency Name ID
- AIN
- Archival
- Archive Date
- Box Barcode
- Box Quick Description
- Box Size
- Business Unit Name

Box Fields to Export

- Record Series Title
- Agency Box #
- Beginning File | Ending File Range

After you click either Export Selected or Export Query, the View File will change from gray (which was unclickable) to orange. If you are ready to view your export information, Click **View File**.

### Open the Export File

TEX LINX

Home Preferences Reports Requests Admin Dashboard Help Print TextLink Resources 19:11 Logout

Export Home Page Grid Close

Enter Field Delimiter  Number Of Records to Export

Export Selected Export Query View File Selected Export File Created

Location Info: Barcode

Saved Export Profiles +

Available Box Fields

- Accessioned
- Actual Destruction Date
- Agency Name
- Agency Name ID
- AIN
- Archival
- Archive Date
- Box Barcode
- Box Quick Description
- Box Size
- Business Unit Name
- Confidentiality
- Create Date
- Created By Barcode
- Created By Description
- Current Location
- Days
- Deleted
- Destruction Batch #
- Division ID
- Division Name
- Drive Date
- Due Date
- Eligible Destruction Date
- Event Based
- Event Trigger

Select All

Box Fields to Export

- Record Series Title
- Agency Box #
- Beginning File | Ending File Range

Clear

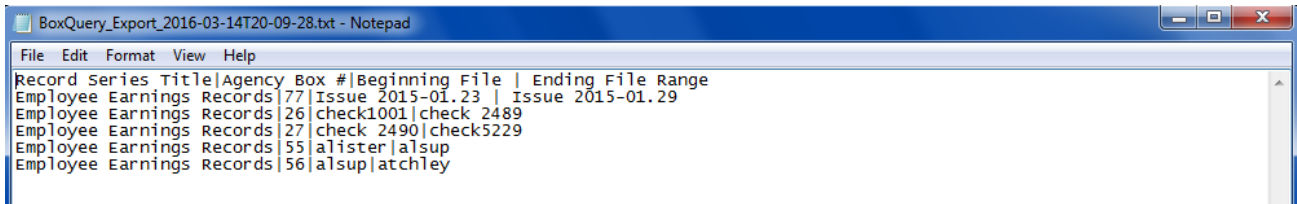
Do you want to open or save BoxQuery\_Export\_2016-03-14T20-09-28.txt (325 bytes) from testtexas.cloudapp.net? Open Save Cancel

Depending upon your computer browser's settings, one of three things will happen:

1. The export file will open on its own in Notepad or another text editor.
2. A pop-up like the one above will appear (1). Click **Open**.
3. Nothing will appear to happen. Contact your IT department (or other computer assistance person at your agency) to adjust your computer's pop-up setting or use another web browser.

## APPENDIX: Export

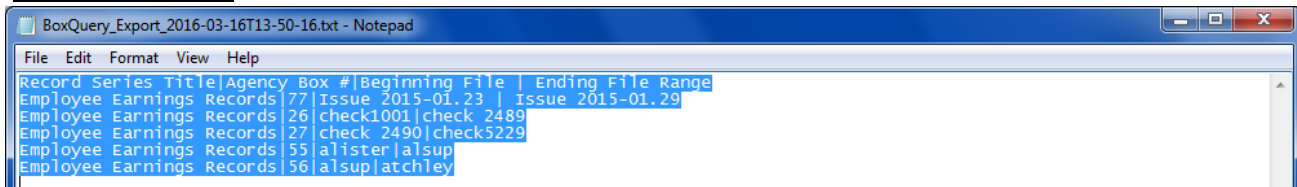
### Text Editor (Notepad) File



This is the window that appears after you click Open from the pop-up or that automatically opened when you clicked View File.

**TEX SAYS** *TexLinx is still open. You might want to return to TexLinx at this point and Logout before you get timed out.*

### Select and Copy

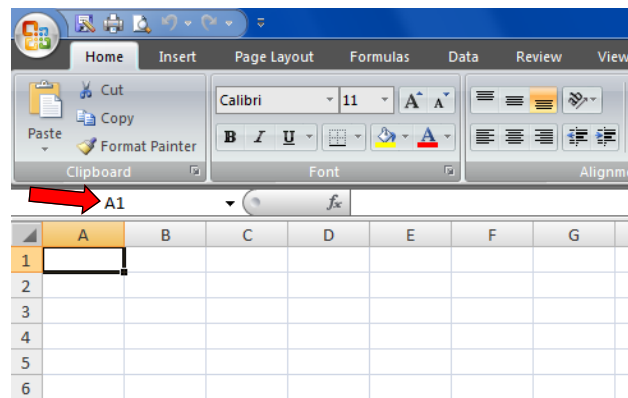


Select all of the text by holding down CTRL and pressing A. (Or right click the mouse and choose Select All from the menu.)

With the text highlighted, copy the text by holding down CTRL and pressing C. (Or right click the mouse and choose Copy from the menu.)

## Spreadsheet

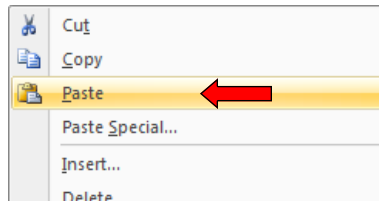
### Open Excel



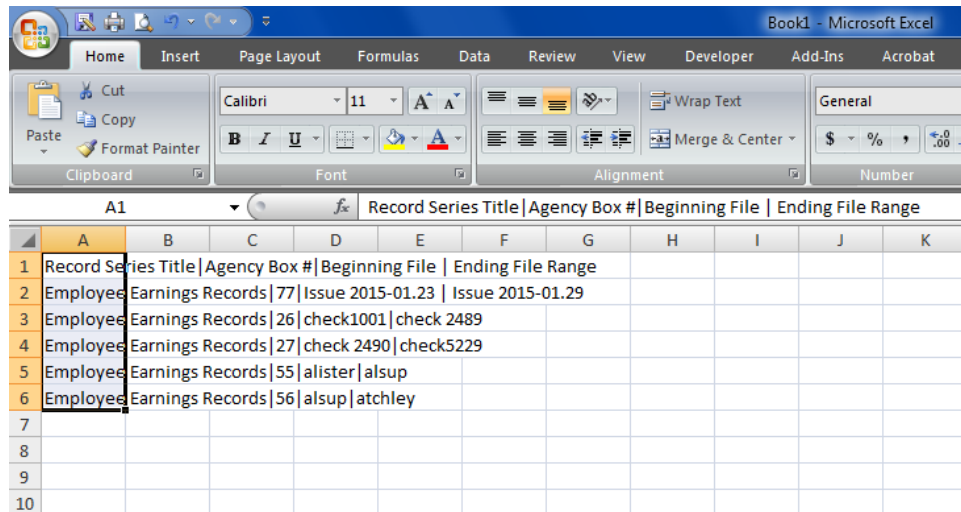
Open a blank Excel (or other spreadsheet program) screen. Click once on the first cell (identified in this image as cell A1 since it is in column A, row 1).

## APPENDIX: Export

### Paste Information

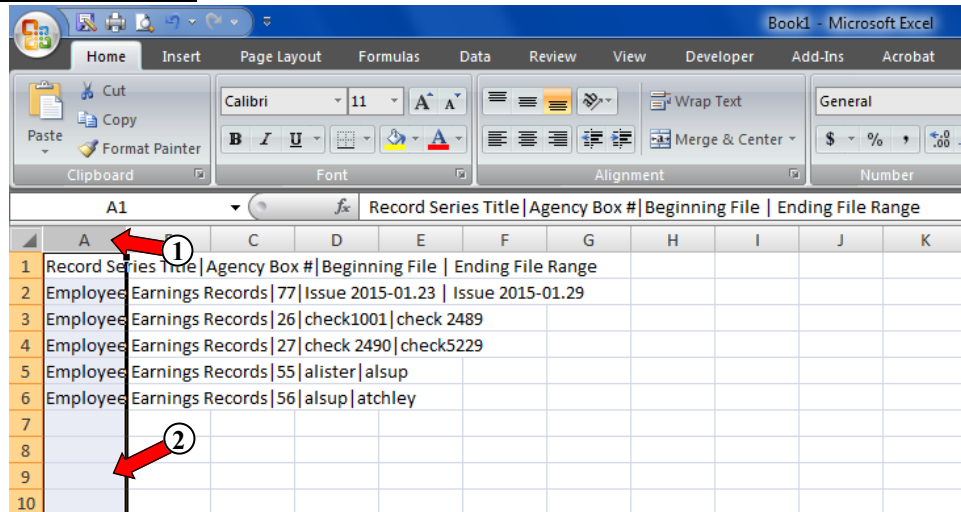


With the first cell on the spreadsheet selected, right click on your mouse and select Paste.



The information from the Notepad will paste onto the spreadsheet.

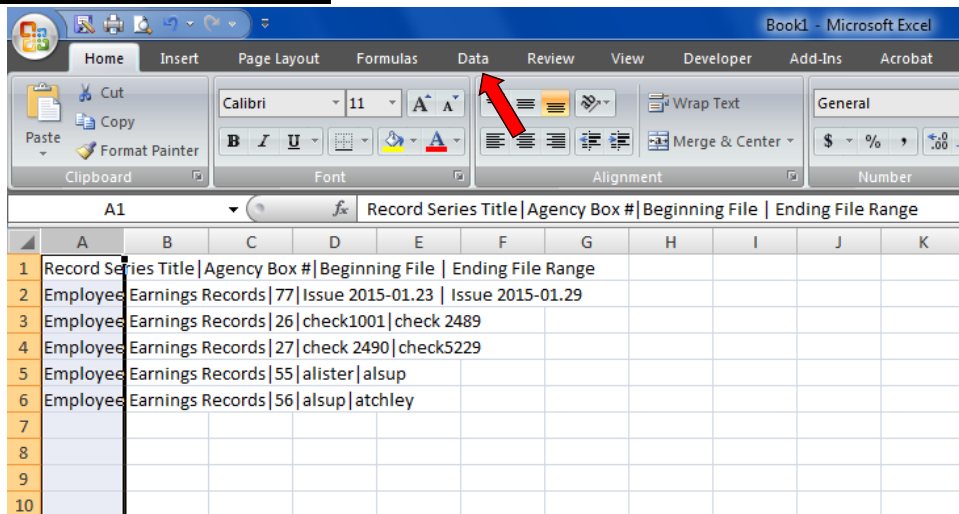
### Convert Text to Columns



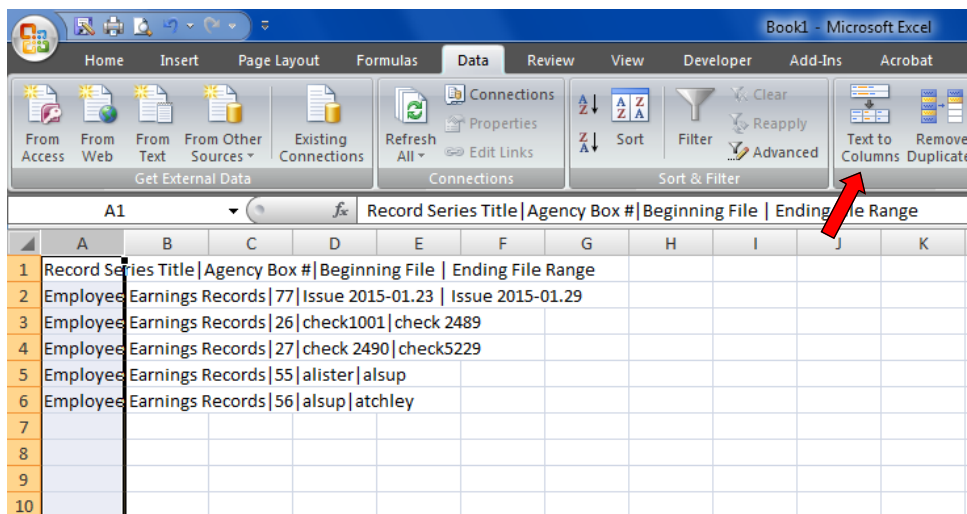
Click the A column header (1) and the entire row will be selected (2). This is needed to convert the text to columns.

## APPENDIX: Export

### Convert Text to Columns: Data tab



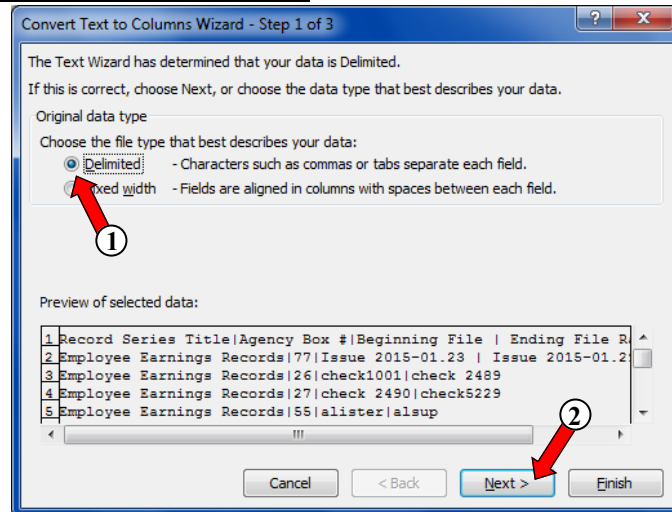
With the A column selected, click once on the **Data** tab at the top of the screen.



When **Data** was clicked, a new set of menu options appears. Click once on **Text to Columns**.

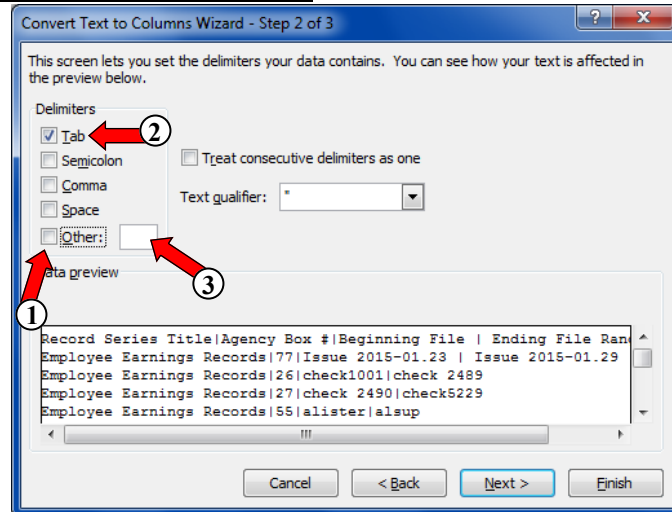
## APPENDIX: Export

### Convert Text to Columns Wizard: Step One



The first step is the easiest: Make sure **Delimited** is selected (1) and click **Next** (2).

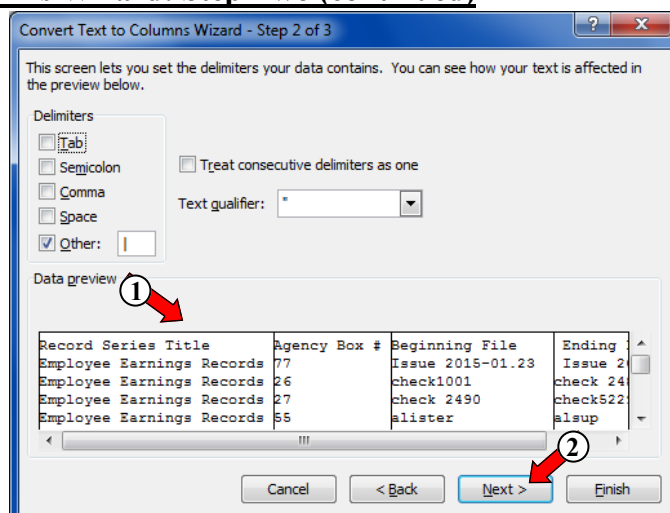
### Convert Text to Columns Wizard: Step Two



The area you need to adjust in this step is **Delimiters**. The only checkbox that should be selected here is **Other**: (1). If anything else is selected (Tab, in this case (2)), deselect it. In the field next to **Other**: (3), type the Pipe symbol. Use **SHIFT \** to create |

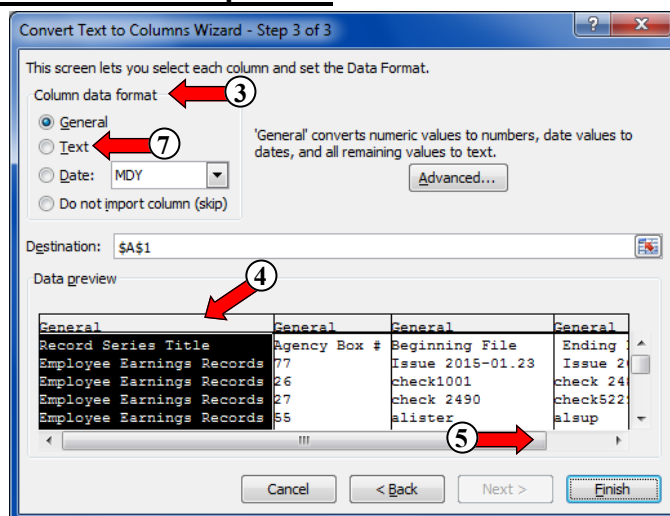
## APPENDIX: Export

### Convert Text to Columns Wizard: Step Two (continued)



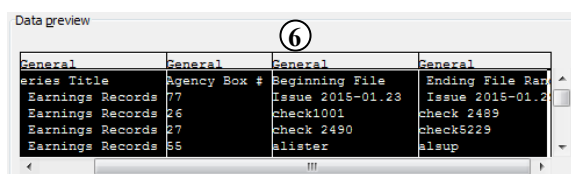
When you click the checkbox for Other and enter the Pipe symbol in the Other: field, the **Data Preview** section (1) converts the information to columns. You see all of the rows of information you have. This is just a sample of your data. Once your screen looks similar to the above screen, click Next (2).

### Convert Text to Columns Wizard: Step Three



What you select in **Column data format** (3) affects the information for each column in **Data Preview** (4). When you first arrive at this screen, the first column is already selected (the black box with white text is an indication that area is selected).

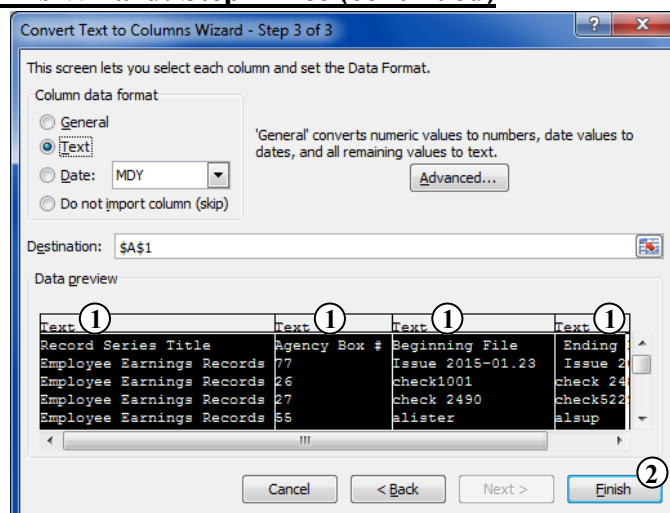
The first thing to do is select all of the columns in the **Data preview** section. With the first column selected, use the scroll bar (5) to move to the final column. When you arrive at the final column, hold the SHIFT key and click once in the last column. All columns will be selected (6). Move the scroll bar back to the left to make sure all columns are selected.



Now, go back up to the **Column data format** section, click once on Text (7).

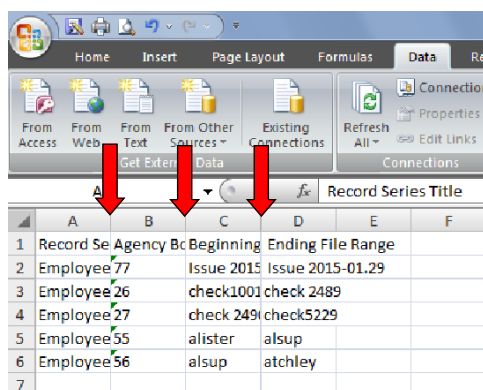
## APPENDIX: Export

### Convert Text to Columns Wizard: Step Three (continued)



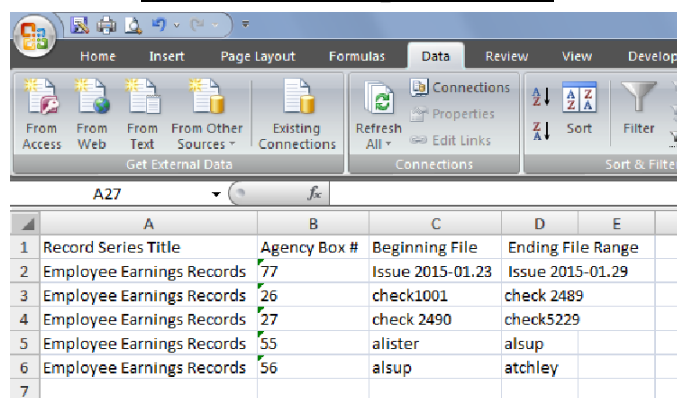
You will see the information header for each column changes from General to Text (1). Once this is done, click **Finish** (2). You will be returned to the Excel spreadsheet.

### Return to the Spreadsheet



Your information is now split into columns. The fields you chose in TexLinX are now the column headers. Use the column guides at the top of each row (the vertical lines between the letters) to move each column to see all of the data so you can see all of the data for each column.

### The Finished Spreadsheet



Once you are finished with your spreadsheet, be sure to save it to your computer or an external storage device if you might need it for future reference.

## APPENDIX: Export

## NOTES

[illegible]

## APPENDIX: Export

## NOTES

[illegible]